

**MEMO# 13889**

August 24, 2001

## **INSTITUTE CONFERENCE CALL SCHEDULED FOR FRIDAY, SEPTEMBER 7, 2001 2:00 P.M. EST ON RMD REPORTING ISSUES**

[13889] August 24, 2001 TO: PENSION COMMITTEE No. 60-01 PENSION OPERATIONS ADVISORY COMMITTEE No. 53-01 RMD REFORM AD HOC COMMITTEE No. 4-01 RE: INSTITUTE CONFERENCE CALL SCHEDULED FOR FRIDAY, SEPTEMBER 7, 2001 2:00 P.M. EST ON RMD REPORTING ISSUES The Institute has scheduled a conference call on Friday, September 7, 2001 at 2:00 p.m. EST to discuss the IRS's proposed reporting requirements for IRA trustees under the section 401(a)(9) proposed regulations. The purpose of the call is to continue our discussions regarding the proposed reporting requirement involving required minimum distributions and to update you regarding a recent meeting involving Institute staff and IRS and Treasury representatives on this issue. If you would like to participate on the call, please fax the response form to Dollie Currie at (202) 326-5841 by COB Wednesday, September 5, 2001. We look forward to talking to you on the 7th. Kathryn A. Ricard Associate Counsel Attendance Form For Institute's Conference Call On RMD Reporting Friday, September 7, 2001 at 2:00 p.m. Yes, I will participate on the Institute's conference call on RMD Reporting on Friday, September 7, 2001 at 2:00 p.m. EST. To participate in the call, dial 1-800-305-1078 and ask for the RMD call, confirmation number 5486431.

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Committee Member Company Phone

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