

MEMO# 15691

February 24, 2003

FEBRUARY 28 CONFERENCE CALL TO DISCUSS NEW IRS FORM 1099-Q

[15691] February 24, 2003 TO: 529 PLAN ADVISORY COMMITTEE No. 12-03 TRANSFER AGENT ADVISORY COMMITTEE No. 22-03 RE: FEBRUARY 28 CONFERENCE CALL TO DISCUSS NEW IRS FORM 1099-Q A conference call has been scheduled for Friday, February 28, 2003 at 1:00 p.m. EDT to discuss the new IRS Form 1099-Q. Specifically, we will be discussing any member issues with the form's new reporting rules. The Institute will draft a comment letter to the Internal Revenue Service to address issues relating to the new form. If you would like to participate in this call, please complete the attached response form and fax it to Brenda Turner by Thursday, February 27, 2003. Please dial 1-888-942-8163 and ask for the ICI "1099-Q" call, Lisa Robinson, moderator. In addition, if there are specific issues that you would like to discuss during the call, please provide the items on the response form. You may also contact me at 202-326-5835 or lrobinson@ici.org. Lisa Robinson Assistant Counsel Attachment (in .pdf format)

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