

**MEMO# 14271**

December 21, 2001

## **RECENT INSTITUTE DEVELOPMENTS IN THE PENSION AREA**

[14271] December 21, 2001 TO: PENSION COMMITTEE No. 77-01 PENSION OPERATIONS ADVISORY COMMITTEE No. 77-01 RE: RECENT INSTITUTE DEVELOPMENTS IN THE PENSION AREA

**Institute Staff Developments** The Institute has appointed Keith Lawson, an Institute attorney for the past thirteen years and the head of the Institute's tax group, to also head the Institute's pension group within the General Counsel's Office. Keith will retain his title of Senior Counsel. Thomas Kim, who has been a member of the Institute's pension group for almost three years, has been promoted to Associate Counsel. Kathy Ireland, an Institute Associate Counsel with many years of industry pension experience, has moved from the Institute's securities group to the pension group. We are currently interviewing applicants for an Assistant Counsel position in the pension group.

**Next Committee Meetings Scheduled** for February 13 and 14, 2002 The next joint meeting of the Pension Committee and the Pension Operations Advisory Committee will be held on Thursday, February 14, 2002, at 10:00 a.m., in the Institute's David Silver Conference Room. A meeting of interested members from the Committees or their alternates will be held on Wednesday, February 13, 2002, at 2:00 p.m., in the David Silver Conference Room to discuss potential legislative and/or regulatory changes to the regime (including Title I of ERISA) governing the investment of retirement assets. A separate memorandum containing additional information regarding these meetings will be distributed in January.

**2002 Retirement Plans Conference Scheduled** for April 28-30, 2002 The 2002 Retirement Plans Conference will be held on Monday, April 29 and Tuesday, April 30, 2002 (with registration and a reception on Sunday, April 28) at the Grand Hyatt Hotel in Washington DC. The 2002 conference will be jointly cosponsored by the Institute and the Securities Industry Association. A preliminary conference brochure, including registration materials, will be distributed in January. Craig S. Tyle General Counsel