

MEMO# 35000

February 23, 2023

Registration and Agendas for March 9 and 10 Tax Committee Meetings

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TO: Global Tax Committee

Management Company Tax Subcommittee

Tax Committee RE: Registration and Agendas for March 9 and 10 Tax Committee Meetings

[Registration](#) is open for the next meetings of the ICI Tax Committee on March 9 and 10, 2023. The meetings will be held in the conference center on the first floor of ICI's building at 1401 H Street, NW, Washington, DC 20005. Please note that these meetings will be held in person; no virtual option is available. Preliminary agendas are attached.

On Thursday, March 9, we will discuss lending fees, the use of technology by tax departments, and SEC regulatory developments. The meeting will begin at 2:00 p.m. (ET); lunch will be served beforehand beginning at 12:30 p.m.

On Friday, March 10, we will discuss various legislative, regulatory, international, and state tax issues of interest to our members. The Friday meeting will begin at 9:30 a.m. and conclude around 12:30 p.m. Breakfast will be served beforehand beginning at 8:00 a.m., and boxed lunches will be available after the meeting.

Reception

We will hold a reception for the Tax Committee on March 9 immediately following the close of the meeting. Food and drinks will be served. The cost of the reception is \$60 per person; you will be able to pay for the reception when you register for the meetings through Cvent. The reception will end at 7:00 p.m.

Building Security

Due to security requirements in our building, please register by noon on Wednesday, March 8. Attendees must show identification to security in the front lobby of our building upon arrival and then will be escorted to the conference area.

Continuing Professional Education Credit

Meeting attendees are eligible for 6 hours of CPE credit. The Investment Company Institute is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

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- Learning Objectives: To provide updates on current tax and regulatory developments affecting mutual funds and investment advisers.
- Program Level: Basic
- Delivery Mode: Group live
- Prerequisites: No prerequisites or advance preparations are necessary for this program
- Recommended Field of Study: Taxes

If you have any questions about the meetings or have specific items you would like to discuss, please contact Karen Gibian (kgibian@ici.org), Keith Lawson (lawson@ici.org), or Katie Sunderland (katie.sunderland@ici.org). You may also contact Nadia Ishmael (Nadia.ishmael@ici.org) or Jean Zadeh (jean.zadeh@ici.org) if you have questions about registration or other logistics.

Joy Lopez

Chair, Tax Committee and Global Tax Committee

Vice President, Head of Investment Tax, Dimensional Fund Advisors

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