

IDC UPDATE

August 4, 2022

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Register Now: IDC *Foundations* Orientation Program, September 14-15

Registration is now open for IDC's in-person [orientation program](#) for newer fund directors. The program will take place in Pasadena, California on September 14-15. The *Foundations for Fund Directors*® [program](#) is designed for independent directors with up to five years of experience and can serve as a useful refresher course for all directors, no matter their level of experience. Topics include the fundamentals of registered funds, directors' role as fiduciaries, and director responsibilities. Participation is limited to independent directors of ICI member funds. Click [HERE](#) to register.

William Birdthistle Gives Speech on Investment Management

On July 26, William Birdthistle, Director of the Securities and Exchange Commission's Division of Investment Management, [spoke](#) on current issues and trends in investment management at the Practising Law Institute's Investment Management 2022 program. His remarks included an announcement that the division will not extend no-action relief related to payments for research that expires next year. He also spoke on regulatory priorities related to funds and advisers, the LIBOR transition, money market fund reform, and financial stability. You can read ICI's summary of the remarks [here](#) (login required).

Save the Date: IDC's Next Speakers Series Event Features Roger Ferguson

IDC will continue its [Speakers Series](#) on Monday, October 3 at 11:00 a.m. (ET) with **Roger W. Ferguson Jr.**, the immediate past President and Chief Executive Officer of TIAA and former Vice Chairman of the Board of Governors of the US Federal Reserve System. IDC's Speakers Series gives fund independent directors insight into the current environment in which regulated funds and their boards operate. Directors of ICI member funds are also invited to view the recordings of previous events in IDC's Speaker Series, including [Diversity, Inclusion, and Implicit Bias: An Interview with Song Richardson](#).

Save the Date: IDC Fund Directors Conference, October 24-26

Join IDC in Chicago October 24-26 for our [2022 Fund Directors Conference](#), the premier event for the independent director community. A stellar lineup of expert speakers and panelists will address important issues facing fund directors and the fund industry at large. Stay tuned for registration details!

Participate in ICI's Brand Survey

ICI's Strategic Communications team has [launched a survey](#) to gather insights from members on the brand of the Investment Company Institute. This survey is a key part of

ICI's efforts to better serve and represent our members, helping to shape and advance our advocacy and communications strategy moving forward.

Please fill out the [survey](#) at your earliest convenience. If you have any questions, email our Strategic Communications team at icipubcomm@ici.org.

Mark Your Calendar for Upcoming Events

*All times are shown in **eastern time (ET)**, unless otherwise noted.*

Foundations for Fund Directors®

- [September 14-15 \(Pasadena, California\)](#)

Conference

- [Fund Directors Conference: October 24-26](#)

Speakers Series

- Roger W. Ferguson, October 3, 11:00 a.m.

Please contact [Paul Mussoni](#) for additional information. A list of IDC events can be found on [IDC's website](#).

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