

## IDC UPDATE

September 1, 2022

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## Registration Open for IDC Speakers Series Event Featuring Roger Ferguson

IDC continues its Speaker Series with Roger W. Ferguson Jr., on Monday, October 3 at 11:00 a.m. (ET). Mr. Ferguson is the immediate past President and Chief Executive Officer of TIAA and former Vice Chairman of the Board of Governors of the US Federal Reserve. Join your colleagues to hear his insight on the current state of the economy as well as the future of financial services. This event is open to members (complimentary) and non-members (fee required).

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## IDC Fund Directors Conference, October 24-26

Join IDC in Chicago on 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.

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## Register Now for IDC Chapter Meetings

Registration is now open for IDC's Chapter meetings in Southern California on Thursday, September 15; Washington, DC on Thursday, October 6; and New York City on Wednesday, November 16. Chapter meetings are open to independent and interested directors of ICI member funds. Fund directors will engage in informal discussions about issues that affect the fund industry and the role of directors.

The Southern California Chapter Meeting will take place on Thursday, September 15, from 10:00 a.m. to 2:00 p.m. (PT) at Western Asset Management in Pasadena, California. Paul Wynn, former Senior Portfolio Manager at Western Asset Management and Founder of Inflated Opinions, will discuss board oversight of portfolio management in a high inflation environment. For those able to join us, we will have an informal dinner the evening before on Wednesday, September 14.

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The Washington, DC Chapter Meeting will take place at IDC's offices on Thursday, October 6, from 10:00 a.m. to 2:00 p.m. (ET). We will be joined by Sean Collins, Chief Economist at ICI, for a presentation on fixed income fund flows and potential swing pricing regulation.

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The New York Chapter Meeting will take place on Wednesday, November 16, from 10:00 a.m. to 2:00 p.m. (ET) at Baker McKenzie in New York City. Jen Klass, Partner at Baker

McKenzie, will discuss distribution trends in the asset management industry and the impact on funds and fund directors.

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## Save the Date: Boston Directors Chapter Meeting

IDC will hold its next chapter meeting for Boston directors on Tuesday, October 4, from 10:00 a.m. to 2:00 p.m. (ET) in Boston. The meeting is open to independent and interested directors of ICI member funds. James Poterba, the President and CEO of the Cambridge-based National Bureau of Economic Research, Mitsui Professor of Economics at MIT, and an Independent Director of the TIAA-CREF Funds, will discuss current economic developments, particularly the prospect of a shift to a higher-inflation environment, and some of their implications for funds and fund directors. Registration will open shortly.

## SEC Releases Draft Strategic Plan for Fiscal Years 2022-2026

The Securities and Exchange Commission (SEC) recently [released for public comment its draft strategic plan for fiscal years 2022 to 2026](#). The strategic plan [focuses on three goals](#): 1) “protecting working families against fraud, manipulation, and misconduct;” 2) “developing and implement[ing] a robust regulatory framework that keeps pace with evolving markets, business models,” and technologies; and 3) “supporting a skilled workforce that is diverse, equitable, and inclusive.” The strategic plan outlines several initiatives to address these priorities including, among other things, modernizing disclosures and updating SEC rules to reflect evolving technologies and business models. To support its diversity and inclusion efforts, the SEC will focus on recruiting, training, and retaining staff with the “right mix of skills, experience, and expertise.” Comments on the proposed strategic plan are due within 30 days after it is published in the Federal Register.

## Mark Your Calendar for Upcoming Events

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

### Conference

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

### Speaker Series

- [Roger W. Ferguson, October 3, 11:00 a.m.](#)

### Chapter Meetings

- [Southern California, September 15, 10:00 a.m. \(PT\)](#)
- Boston, October 4, 10:00 a.m.
- [Washington, DC, October 6, 10:00 am.](#)
- [New York, November 16, 10:00 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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