



INVESTMENT
DEALERS
ASSOCIATION
OF CANADA

bulletin



ASSOCIATION
CANADIENNE
DES COURTIERS
EN VALEURS MOBILIÈRES

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For distribution to relevant parties within your firm

BULLETIN #2998

May 22, 2002

NOTICE OF WEBCAST SEMINAR: MAINTAINING RELATIONSHIPS WITH CUSTOMERS RELOCATING TO THE UNITED STATES

The Investment Dealers Association of Canada invites legal and compliance professionals, supervisors of sales operations and all other interested parties to access the Investment Dealers Association's first webcast seminar for Member firms. This educational seminar will be available on the internet and accessible from the IDA website at www.ida.ca.

The webcast will focus on the US securities laws that permit Canadian investment dealers to maintain relationships with their customers who are present in the US on a temporary basis or who are there permanently and hold Canadian self-directed tax advantaged accounts.

Topics covered include:

- The regulatory relief granted to dealers to permit them to deal with clients living in the US on a temporary basis or who hold Canadian self-directed tax advantaged accounts
- US State 'Blue Sky' laws
- Detailed explanations of the US federal securities laws
- US federal tax law issues as they relate to investments by Canadians present in the US.

Chuck Potuznik and Grant Vingoe, our U.S. IDA counsel with Dorsey and Whitney LLP, will describe the impact of the U.S. legal and regulatory framework on Member firms dealing with Canadians temporarily and permanently resident in the United States. The presentation will be particularly relevant for Member firms by describing the framework through real-world examples.

The webcast seminar will be available at the IDA site for 90 days, starting May 23 at 2:00pm. (EST).

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Association Secretary

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