

The New ICI.org



Agenda


- 1 Website Overhaul Process
- 2 Enhancing the User Experience
- 3 Simplifying & Strengthening our Content

Website Overhaul



The Old ICI Website

IDC | ICIEF
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[POLICY PRIORITIES](#) | [RESEARCH](#) | [FUND OPERATIONS](#) | [NEWS AND RESOURCES](#) | [EVENTS](#) | [ICI GLOBAL](#)


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Registration is now open for the 2024 Leadership Summit, the premier asset management event for industry leaders.


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RESEARCH



STATISTICS




GOVERNMENT AFFAIRS



ICI GLOBAL

The US Retirement System: Working for America's Middle Class

ICI research shows that the two components of defined contribution plans, 401(k)s and Social Security, have successfully worked together to help build the middle class.



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Latest News and Views

ICI VIEWPOINTS

Looking Back on a Century of Innovation

As ICI celebrates the 100th anniversary of the mutual fund, we're all celebrating 100 years of...

[More →](#)

NEWS RELEASE

ICI Statement on DOL Final Fiduciary Rule

April 23, 2024—ICI President and CEO Eric Pan released a statement after the Department of Labor...

[More →](#)

ICI VIEWPOINTS


Electronic Delivery of Financial Information Is Way Overdue

From paying bills to ordering pizza, most people reach for an electronic device when they need...

[More →](#)

Ok, Boomer: Retirement Prospects for Younger Americans Actually Look Bright

New ICI data show that the growth of DC plans in the US has empowered workers of all ages, and Gen Z and Millennials are benefiting from earlier engagement with these plans.



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STATISTICS

Weekly Estimated ETF Net Issuance

The estimated value of all exchange-traded fund (ETF) shares issued exceeded that of shares redeemed by \$22.85 billion for the week ended February 14, 2024.

VIDEOS

How to Protect Yourself from Account Takeover Schemes

All investors, including mutual fund shareholders, are potential targets for internet fraud. Watch this video to learn more about protecting your account.

Trends in Mutual Fund Investing

The combined assets of the nation's mutual funds increased by \$822.22 billion, or 3.3 percent, to \$25.52 trillion in December.

Jump In for Mutual Fun

Mutual funds are investment pools, in which a professional manager invests a pool of money on behalf of many investors. Learn why 102 million investors in the United States have jumped into these pools.

Monthly ETF Assets and Net Issuance

The combined assets of the nation's exchange-traded funds (ETFs) were \$6.99 billion in December.

Why Do Investors Like Money Market Funds?

Investors choose money market funds as a cash management tool for the many benefits they offer. This video explores what money market funds are and why investors find them useful.


Quarterly Retirement Market Data

Total US retirement assets were \$36.7 trillion as of June 30, 2023, up 3.1 percent from March 31, 2023. Retirement assets accounted for 31 percent of all household financial assets in the United States as of the end of June 2023.

[View all →](#)

The SEC's Liquidity Proposal Is Arbitrary and Harmful to Investors


ICI's research team explores how the SEC's liquidity proposal will ultimately lead to higher costs, inexperienced tax bills, and lower returns.



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About ICI

The Investment Company Institute (ICI) is the leading association representing regulated investment funds. ICI's mission is to strengthen the foundation of the asset management industry for the ultimate benefit of the long-term individual investor. Its members include mutual funds, exchange-traded funds (ETFs), closed-end funds, and unit investment trusts (UITs) in the United States, and UCITS and similar funds offered to investors in other jurisdictions. ICI also represents its members in their capacity as investment advisers to certain collective investment trusts (CITs) and retail separately managed accounts (SMAs). ICI has offices in Washington, DC, Brussels, and London, and carries out its international work through ICI Global.



Read more in this year's Annual Report

[Explore ICI's core mission →](#)

Subscribe to the "ICI Daily" morning newsletter for the latest industry news and ICI updates

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ICI Global

IDC Independent Director Council

ICI INVESTMENT COMPANY INSTITUTE EDUCATION SUBCOMMISSION

GENERAL

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MEMBER RESOURCES

[Business Continuity](#)

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The Old ICI Website

About the Investment Company Institute

2023 ICI Annual Report to Members

Bringing the perspective of funds, their shareholders, directors, and advisers to regulators and policymakers around the world.

[READ THE LATEST ANNUAL REPORT](#)

The Investment Company Institute (ICI) is the leading association representing regulated investment funds. ICI's mission is to strengthen the foundation of the asset management industry for the ultimate benefit of the long-term individual investor. ICI's members include mutual funds, exchange-traded funds (ETFs), closed-end funds, and unit investment trusts (UITs) in the United States, and UCITs and similar funds offered to investors in other jurisdictions. Its members manage \$35.1 trillion invested in funds registered under the US Investment Company Act of 1940, serving more than 100 million investors. Members manage an additional \$9.1 trillion in regulated fund assets managed outside the United States. ICI also represents its members in their capacity as investment advisers to certain collective investment trusts (CITs) and retail separately managed accounts (SMAs). ICI has offices in Washington, DC, Brussels, and London, and carries out its international work through ICI Global.

History of ICI

The Investment Company Institute (ICI) has been a key institution in the securities markets since the first half of the 20th century.

- For more than 80 years, its purpose has been to support regulation that strengthens the foundation of investment companies and asset managers more broadly for the ultimate benefit of the long-term individual investor.
- It is the only association that represents US mutual funds, exchange traded funds, and closed-end funds as well as UCITs and other collective investment vehicles.
- Its membership is nearly universal, including funds with 97% of total US fund assets.

[READ MORE ABOUT ICI'S HISTORY](#)

Benefits of Membership in the Investment Company Institute

For more than 80 years, regulated funds have helped investors around the world realize their most significant financial goals. Your firm is one of hundreds that bring funds and their vital services to hundreds of millions of the world's savers.

[READ MORE](#)

About ICI Members

Criteria for ICI Membership

The Investment Company Institute (ICI) is the leading association representing regulated funds...

[More →](#)

ICI Member Organizations

The Investment Company Institute (ICI) is the leading association representing regulated funds...

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ICI Member Funds

The Investment Company Institute (ICI) is the leading association representing regulated funds...

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ICI Experts – Research

Experts in ICI's research department study issues of public policy, economic and market developments, and shareholder demographics.

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The Old ICI Website

Research and Statistics

The 2025 Investment Company Fact Book Is Here!

The latest edition of ICI's flagship publication shares a wealth of research and data on trends in the investment company industry. Visit our *Fact Book* website for downloadable data files of all the figures and tables in this book.

[FACT BOOK WEBSITE](#)

PLEASE NOTE:

Due to scheduled maintenance on the ICI website, new data files released on Wednesday, October 1 and Thursday, October 2 will not be posted until Friday, October 3. Please contact media@ici.org to obtain access to any necessary files prior to Friday.

Copyright Permission Requests

The Investment Company Institute makes the information on its website available to anyone. Permission to reuse ICI materials may be obtained online.

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Industry Research

Learn more about ICI research on industry-related developments and policy issues, including shareholder costs, money market funds, ETFs, and the industry's role in international markets.

[LEARN MORE](#)

Investor Research

Through extensive research on investor demographics, ICI examines who owns mutual funds and closed-end funds, as well as ownership of different types of retirement accounts.

[LEARN MORE](#)

Retirement Research

ICI collects and analyzes data on the US retirement market, including defined contribution plans and individual retirement accounts, and informs discussion on retirement and tax policy.

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Statistics

ICI is the primary source for statistical data on the investment company industry, including mutual funds, exchange-traded funds, closed-end funds, and ETFs.

[LEARN MORE](#)

Research Publications

ICI's research publications cover industry, retirement, and investor research, and include the *Investment Company Fact Book*, a comprehensive summary of ICI's data and analysis.

[LEARN MORE](#)

Glossary of Investing Terms

You can find more information about many of these entries in the chapters and appendix of the *Investment Company Fact Book*.

[READ MORE](#)

Steps of the Rebuild

1

Discovery

2

Design

3

Development

4

Deploy

Steps of the Rebuild: Discovery

- **Stakeholder Feedback**
- Technical & Architecture Audit
- Content Audit

Stakeholders said:

- “The important stuff is too far down and you know if you don’t scroll far enough or you just think like, well, I don't see what I want and I don't want to think about scrolling.”
- “The current website is a reflection of failing to weigh priorities against each other.”
- “The website shouldn’t be all things to all people. Site is content heavy and users don’t know where to look to find things.”

Steps of the Rebuild: Discovery

- Stakeholder Feedback
- **Technical & Architecture Audit**
- Content Audit

Security

“We recommend the implementation of a firewall solution. This can serve not only as a filter for any malicious traffic to the site but also as a CDN which can overall increase the site performance. We recommend Acquia Edge as it is a comprehensive security and CDN solution provided by Acquia.”

Steps of the Rebuild: Design

- Requirements and Features Prioritization
- **Creative Inspiration and Mood Boards**
- Information Architecture
- Wireframes and Designs
- User Testing on Content and Information Architecture



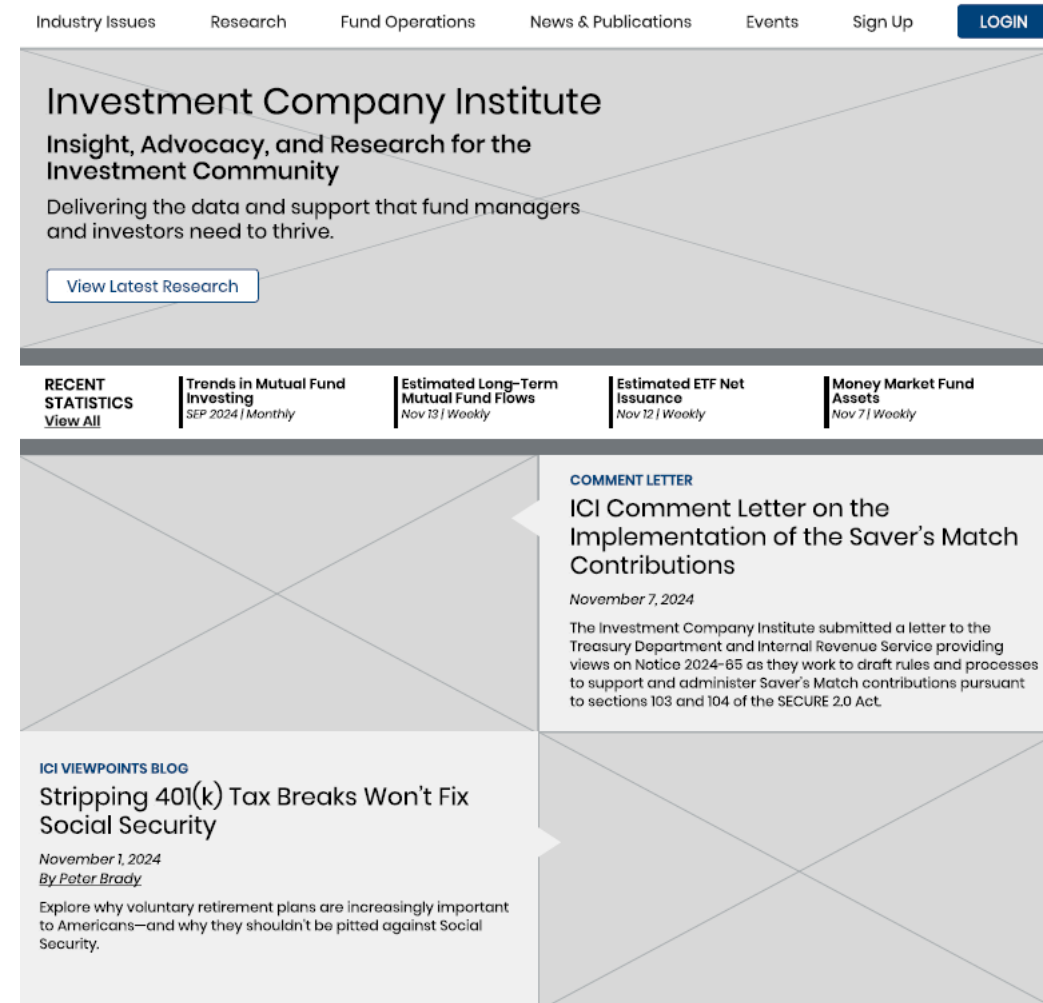
OPINION
US Retail Investment Under Attack from Bunk 'Common Ownership' Theory

Advancing new red tape based on discredited idea would only harm investors and our capital markets.

[Read Theory Details](#)

Steps of the Rebuild: Design

- Requirements and Features Prioritization
- Creative Inspiration and Mood Boards
- Information Architecture
- **Wireframes and Designs**
- User Testing on Content and Information Architecture



Steps of the Rebuild: Development

- System environment and architecture set-up
- Build site components and content types
- ICI application integration
- User Acceptance and Usability Testing
- Bug Fixes
- Training



Steps of the Rebuild: Deploy

- Quality testing and bug fixes
- **Communication Planning**
- **GO LIVE!**

Timings and Tasks

DATE	COMMS TYPE	TASK	RESOURCE/S
Week of 29	Meeting	<ul style="list-style-type: none"> • Provide demo and preview of site to all staff 	<ul style="list-style-type: none"> • Kevin /Dinesh /Tactis
Week of Oct 6	Meeting	<ul style="list-style-type: none"> • Eric to make announcement to Board of Governors 	<ul style="list-style-type: none"> • Eric/Strat Comms
	Newsletter	<ul style="list-style-type: none"> • Add card in ICI Daily to provide readers with sneak preview of new site 	<ul style="list-style-type: none"> • Eliza
	Website	<ul style="list-style-type: none"> • Distribute training content to all ICI employees 	<ul style="list-style-type: none"> • Strat Comms /Tactis
Oct 13	LAUNCH DAY		
	Website	<ul style="list-style-type: none"> • Add website banner to welcome users to the new site • Add video to highlight key features 	<ul style="list-style-type: none"> • Design • Design/Tactis
	Press	<ul style="list-style-type: none"> • Add press release to website and on wires 	<ul style="list-style-type: none"> • Melissa
	Newsletter	<ul style="list-style-type: none"> • Add card to ICI Daily to announce launch and promote throughout the week 	<ul style="list-style-type: none"> • Eliza

	Email	<ul style="list-style-type: none"> • Eric to send email to the Board announcing the new website is live (ICI) • Tom to send email to Directors announcing the new website is live (IDC) • All staff email announcing launch • Committee Chairs to send email to committee members announcing launch • Pete to send email to announce launch of the new website to conference sponsors 	<ul style="list-style-type: none"> • Eric • Editorial / Tom • Tbd • Tbd • Pete
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Launch

10/2/2025 6:30 PM



GO FOR LAUNCH

The NEW ICI Website



The NEW ICI Website

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Nearly Half of 401(k) Owners Wouldn't Save Except for Their Retirement Plan

ICI's new survey explores the key role 401(k) plans play in getting Americans to save for retirement.

[Learn More](#)

Recent Industry Statistics [View All State](#)

- Release: Estimated ETF Net Issuance Mar 10 (Posted Weekly)
- Release: Money Market Fund Assets Mar 5 (Posted Weekly)
- Release: Estimated Long-Term Mutual Fund Flows Mar 11 (Posted Weekly)

Our Latest Updates

RESEARCH
The ICI/ISS MI Defined Contribution Plan Profile: A Close Look at 401(k) Plans, 2023 (pdf)

The latest ICI/ISS Mutual Fund Institute Defined Contribution Plan Profile study examines private-sector 401(k) plans in 2023 and finds that employers play a critical role in the success of 401(k) plans and their ability to help American workers prepare for retirement.

March 8, 2023

NEWS RELEASE
More Employers Than Ever Are Contributing to Workers' 401(k) Plans

A new report from ICI and ISS Market Intelligence highlights how employers play a critical role in the success of 401(k) plans and in helping American workers prepare for retirement.

March 8, 2023

NEWS RELEASE
New SEC Staff Guidance Provides Needed Clarity for Funds

ICI released a statement regarding the Securities and Exchange Commission's Division of Investment Management's newly released frequently asked questions on collateralized loan obligations.

March 8, 2023

[View More Updates](#)

Explore Our Resource Hubs

Find experts resources and guidance on key topics

RESOURCE HUB
401(k)

RESOURCE HUB
DOL Fiduciary Duty Rule

RESOURCE HUB
Liquidity Risk Management Program Rule

[View All Resource Hubs](#)

Upcoming Events

INVESTMENT MANAGEMENT CONFERENCE

MARCH 22-25, 2024 - PALM DESERT, CA

ICI CONFERENCE
Mar 22-25 Investment Management Conference
Palm Desert, CA

FOUNDATIONS FOR FUND DIRECTORS*

Apr 8-9
Washington, DC

LEADERSHIP SUMMIT

Apr 29-1
Washington, DC

ICI CONFERENCE
Apr 8-9 Foundations for Fund Directors*
Washington, DC

ICI CONFERENCE
Apr 29-1 Leadership Summit
Washington, DC

[View All Events](#)

Investment Management Conference - Registration Now Open

JW Marriott Desert Springs

Our Impact by the Numbers

\$46.13T

Total Assets Represented

Managed by ICI members across mutual funds, ETFs, closed-end funds, and more, underscoring our industry's economic influence.

29K+

Funds Represented

Represented by ICI's member companies, spanning a diverse range of investment products.

128M+

US Investors

Supported through ICI's advocacy for policies that protect and empower individual investors nationwide.

About ICI

The Investment Company Institute (ICI) provides essential data and insights to strengthen the asset management industry and support informed decisions.

Shaping Public Policy and Regulation

ICI works with regulators and policymakers in the United States and around the world, bringing to bear robust legal and economic analysis to support its efforts and applying a deep understanding of regulatory and policymaking processes and priorities.

Publishing Leading-Edge Research

ICI publishes leading-edge research on financial markets, financial stability, and tax and retirement policy. ICI is also an authoritative source of statistics on the fund industry, collected from ICI member firms and trusted organizations, to provide a comprehensive assessment of the industry and its shareholders at any given point in time.

Supporting the Asset Management Industry

ICI organizes each year eight major public industry conferences and dozens of webinars and trainings each year as well as hosts more than 100 member committees, working groups, and task forces to share industry best practices, gather input from industry professionals, and discuss common challenges related to operations, regulations, and technology.

[Learn More About ICI](#)

Stay Informed with ICI Daily News

Get the latest insights, policy updates, and industry news.

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IDC Independent Director
ICI Education Foundation

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Careers | Contact |



The NEW ICI Website

About the Investment Company Institute

- About
- Our Board and Leadership
- Our Expertise
- Our History
- Our Members
- ICI Annual Report
- ICI Quarterly Update
- Careers
- Investor Connection



The Investment Company Institute (ICI) is the leading trade association representing the asset management industry and the institutional investors they serve. ICI advocates for policies that strengthen capital markets and demonstrates solutions to meet the needs of long-term individual investors seeking for retirement and other financial goals.

Our members are mutual funds, exchange-traded funds (ETFs), all types of closed-end funds, including business development companies (BDCs) and interval funds, and unit investment trusts (UITs) in the United States, and ICI-affiliated similar funds offered to investors in other jurisdictions. ICI also represents members in their capacity as investment advisors to collective investment trusts (CITs) and retail separately managed accounts (SMAs).

Shaping Public Policy

ICI works with regulators and policymakers in the United States and around the world, bringing to them robust legal and economic analysis to assess the effects and applying a deep understanding of regulatory and policymaking processes and priorities.

Publishing Leading-Edge Research and Analysis and the Most Comprehensive and Authoritative Statistics About the Fund Industry

ICI publishes leading-edge research on financial markets, investment strategy, and has a long-standing policy, ICI also publishes a variety of statistics on the fund industry, collected from its member firms and trustee organizations, to provide a comprehensive assessment of the industry and to anticipate or anticipate or act upon other in new.

Supporting the Asset Management Industry

ICI sponsors each year eight major public industry conferences and dozens of webinars and townhalls each year as well as hosts more than 100 member dinners, working groups, and round tables to share industry and practices, gather input from industry professionals, and discuss common challenges related to operations, regulations, and technology.

ICI by the Numbers

\$37.7T

Total Invested in USA
Invested in ICI member funds registered under the Investment Company Act of 1940 in the United States, representing 80% of all assets held by 1940 Act-registered funds in the United States.

\$9.6T

Total Invested in Other Markets
Invested in ICI member funds outside the United States.

128M+

Total US Investors
American investors invested by ICI's members.

Our Mission

- Strengthening the foundation of the asset management industry for the ultimate benefit of the long-term individual investor.
- Building a strong foundation for the industry by helping to strengthen policy and regulatory frameworks and encouraging sound governance, operational, and industry practices.
- Serving as a focal point for collaboration among members in proactively addressing the industry's most critical strategic issues and meeting robust standards that help the industry grow in a sustainable way.
- Advancing the interests of the individual investor through education and expanding access to regulated funds and other professionally managed products that help them meet their financial goals.

Our Expertise

Unique among financial services trade associations, ICI is a full-service organization with unparalleled regulatory expertise also matched by highly-robust operations, global affairs, and strategic communications, as well as world-class research capabilities and government relations capabilities.

[Learn More](#)

More About ICI



Our History



Our Global Presence



Our Members



Our Board and Leadership

2025 Annual Report

The 2025 Annual Report provides a comprehensive overview of ICI's strategic priorities, accomplishments, and industry perspectives.

[Read the report](#)



The NEW ICI Website

Research

Stay informed with the most recent data, trends, and analysis from ICI's Research team.



RESEARCH The ICI/ISS MI Defined Contribution Plan Profile: A Close Look at 401(k) Plans, 2023 (pdf)

The latest 2023 Mutual Fund Institute Defined Contribution Plan Profile study examines private-sector 401(k) plans in 2023 and finds that employees play a critical role in the success of 401(k) plans and their ability to help American workers prepare for retirement.

March 8, 2024 [Download Resource](#)

Latest Statistical Publications

Retiree and Education Savings	Retirement Market	529 Plans
<p>Exchange-Traded Funds (ETFs)</p> <p>Mutual Funds</p> <p>Trends and Market Data</p> <p>Unit Investment Trusts</p>	<p>Release: Quarterly Retirement Market Data, Fourth Quarter 2023</p> <p>Published March 28, 2024</p> <p>Report: The US Retirement Market, Fourth Quarter 2023 (xls)</p> <p>Published March 28, 2024</p>	<p>Release: 529 Plan Program Statistics, December 2023</p> <p>Published March 4, 2024</p> <p>Release: 529 Plan Program Statistics, December 2024</p> <p>Published April 11, 2024</p>

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Publication Date

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ICI Research

Showing Results 1 - 6 of 1007 Total



RESEARCH The Closed-End Fund Market, 2025 (pdf)

April 23, 2024



RESEARCH Supplemental Tables: The Closed-End Fund Market, 2025 (xlsx)

April 23, 2024



RESEARCH How Regulated Funds Value Private Credit: A New Resource from ICI

By Jason Hooper, Michael Spriet

Private credit is one of the fastest-growing segments of today's capital markets. These bonds—made by funds and other investors—were once the domain of large institutions, but regulated funds are increasingly making them available to everyday investors. With that growth come important questions about how funds determine what these assets are worth.

April 23, 2024



RESEARCH Valuation Governance Considerations for Private Credit Assets in Regulated Funds

The growth of private credit in regulated funds has sharpened focus on how less liquid assets are valued. The paper outlines valuation obligations, explains how funds access private credit, and highlights the judgment involved in assessing these investments—along with how evolving data and market infrastructure may shape valuation practices over time.

April 23, 2024



THE FUND The Need for Fund Proxy Voting Reform (pdf)

April 23, 2024



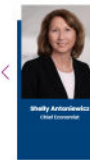
MEMBER 2025 ICI Cybersecurity Benchmarking Survey

[Login or click here to get access to our Member White Paper](#)

April 30, 2024

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Meet the Research Team



Shelly Antoniazzi
Chief Economist



Sharon Warner
Senior Advisor, Industry & Research



Sarah Hadden
Senior Advisor, Retirement & Research



Judy Shearman
Judy Shearman's leader

2025 Investment Company Fact Book

Explore the comprehensive guide to trends, stats, and insights in the investment company industry.

[Visit the Fact Book Website](#)

Necessity of Investing Terms
Because this issue contains information about many of these entries in the chapters and appendixes of the Investment Company Fact Book.



Measuring Success

Strong Early Performance

- **237K** users in the first 3 months
- **430%** YoY growth in visitors
- **204%** YoY growth in engagement
- Member logins increased to **11K**, up from 7K YoY

Website Drivers

- **61%** of traffic originate from direct visits, indicating strong ICI brand awareness

Insights

- Redesign has helped to improve awareness and increased engagement
- New content and continued site enhancements will further increase brand awareness, credibility, and website traffic

User Experience



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Issues & Advocacy


Stay informed of the policy priorities ICI champions on behalf of individual investors and the asset management industry.

- Key Policies >
- Comment Letters
- Amicus Briefs


Latest Comment Letters:



COMMENT LETTER
Supplemental Comment Letter on the CFTC's Proposal Regarding Margin Requirements for Uncleared Swaps
April 24, 2026



COMMENT LETTER
ICI Letter on Proposed Amendments to FINRA Rule 2210
March 18, 2026



COMMENT LETTER
ICI Response to the SEC's Small Entity Definitions Proposal
March 13, 2026


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Ensuring Tax Fairness and Financial Security	Establishing Certainty in Financial Regulations
Expanding Access to Private Markets	Modernizing Disclosure for a Digital World
Retirement Fairness for Educators and Nonprofit Employees	Standing Up for Main Street Investors and Retirement Savers



Navigation

Research

Explore research from ICI's experts on industry-related developments, trends, and policy issues.

[View all Research](#)

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- Investment Company Fact Book
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- Defined Contribution Plans >
- Exchange-Traded Funds >
- Fees and Expenses
- IRAs >
- Money Market Funds
- Mutual Funds >
- Publications >
- Global >

Featured Publication



PUBLICATION
A Close Look at Exchange-Traded Funds and Their Investors (pdf)

Latest Research



PERSPECTIVE
The Closed-End Fund Market, 2025 (pdf)
April 23, 2026



PERSPECTIVE
Supplemental Tables: The Closed-End Fund Market, 2025 (xlsx)
April 23, 2026



ICI VIEWPOINTS
How Regulated Funds Value Private Credit: A New Resource from ICI
April 20, 2026

Member Experience

The screenshot displays the 'Member Resources' section of a website. At the top, there is a dark blue header with the text 'Member Resources' in white. Below this header, there are two links: 'Link to ICI Verify Access' and 'Link to IQuest'. The main content area is white and features a sub-header 'Member Resources'. Below this, there are five white boxes with rounded corners, each containing a resource title and a 'More ->' link. The first row contains three boxes: 'All Memos', 'ICI Committees', and 'Contact ICI Staff'. The second row contains two boxes: 'Statistical Report Builder' (marked as an 'EXTERNAL LINK') and 'Statistical Research Guide (pdf)' (marked as a 'PUBLICATION').

Member Resources

[Link to ICI Verify Access](#)

[Link to IQuest](#)

Member Resources

- All Memos**
[More ->](#)
- ICI Committees**
[More ->](#)
- Contact ICI Staff**
[More ->](#)
- EXTERNAL LINK**
Statistical Report Builder
[More ->](#)
- PUBLICATION**
Statistical Research Guide (pdf)
[More ->](#)

Member Experience

Welcome, John

Member Dashboard

All Committees

Committee Events

My ICI Bookmarks

ICI Staff Directory

ICI Member Access

Memos

White Papers

Statistical Publications

Statistical Report Builder

ICI's Data Collection System

ICI Verify 

 [Get access to our Member Research and Statistics](#)

Account Settings

Logout

Statistical Research Guide

Explore ICI's Statistical Research Guide for insights into data collection, reporting schedules, and compliance guidelines to support informed industry decisions.

[Download Guide \(PDF\)](#) 

My Committees & Working Groups

[Bank, Trust and Retirement Advisory Committee](#)

[BDAC/ETRAC Joint DTCC Multi-Batch Networking Subcommittee](#)

[Broker-Dealer Advisory Committee](#)

[CIT Administration Subcommittee](#)

[CIT Advisory Committee](#)

[Financial Innovation Advisory Committee](#)

[Internal Sales Managers Roundtable](#)

[Investment Adviser and Broker-Dealer Standards of Conduct Working Group](#)

[Operations Committee](#)

[Pension Committee](#)

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Committee Events

May 4 MEMBER MEETING
BTRAC Monthly Call: May
Virtual • 1:00pm - 2:00pm (EDT)

May 19 MEMBER MEETING
CIT Subcommittee Meeting: May
Virtual • 1:00pm - 2:30pm (EDT)

Jun 2 MEMBER MEETING
Transfer Agent Advisory Committee Meeting – June, Day 1
Virtual • 1:00pm - 3:00pm (EDT)

Jun 3 MEMBER MEETING
Transfer Agent Advisory Committee Meeting – June, Day 2
Virtual • 1:00pm - 3:00pm (EDT)

Jun 23 MEMBER MEETING
BTRAC Meeting: June, Day 1
Washington, DC

[View All Committee Events](#)

Latest ICI Premium Updates

 MEMO# 36245
DOL Issues Guidance on EBSA Enforcement Priorities
April 21, 2026 | [Bookmark](#) 

 MEMO# 36245
DOL Issues Guidance on EBSA Enforcement Priorities
April 21, 2026 | [Bookmark](#) 

[View All My Committee Memos](#)

My ICI Bookmarks

[View All My ICI Bookmarks](#)



Simplifying and Strengthening our Content



Communicating our Policy Priorities

Retirement Security

Support of a Defined Contribution System

[The BrightScope/ICI Defined Contribution Plan Profile: A Close Look at ERISA 403\(b\) Plans, 2020 \(pdf\)](#)

[Working for America's Middle Class \(pdf\)](#)

Working for America's Middle Class

The US retirement system is the envy of the world, thanks largely to the success of defined...

[View All →](#)

Regulatory Activities

MARCH 25, 2024 | BY CHRIS CAROFINE

What We Learned at the 2024 Investment Management Conference

March 25, 2024—Set against the backdrop of continued regulatory and legislative uncertainty, the...

ICI President's Address, 2024 ICI Innovate

Any discussion of tech and finance should start with the most exciting innovation of our time. I'm...

ICI Comment Letter on the Definition of an Investment Advice Fiduciary

The Investment Company Institute submitted a comment to the Department of Labor (the "Department")...

[View All →](#)

Legislation

ICI Letter Supporting Three Bipartisan Amendments to Help Americans Save for Retirement

March 5, 2024—The Investment Company Institute (ICI) expresses our strong support for three...

ICI Statement for the Education and Workforce Subcommittee Hearing on "Protecting American Savers and Retirees from DOL's Regulatory Overreach"

February 15, 2024—ICI is pleased to provide this statement regarding the US Department of Labor's (...)

ICI Applauds House Committee Passage of Key Legislation

ICI President and CEO Eric Pan released the following statement on the House Financial Services...

[View All →](#)

Communicating our Policy Priorities

Standing Up for Main Street Investors and Retirement Savers

ICI advocates for policies that promote retirement security and strengthen the middle class.

Key Takeaways:

- The current retirement savings system is fostering economic security in retirement for Americans across all income levels.
- Voluntary retirement accounts like IRAs, 401(k)s, and 403(b)s, along with Social Security, have helped create a stronger middle class.
- ICI supports building upon the strengths of the current voluntary retirement system through innovations and incremental reforms.
- Defined contribution retirement plans and IRAs offer many benefits that include the habit of saving and investing; the ability to accumulate, consolidate, and preserve balances as workers move through their careers; and a wide variety of investment options.
- We encourage Congress to strengthen the tax incentives for defined contribution plans and IRAs to help more Americans save for retirement.

ICI is committed to defending the tax-advantaged U.S. retirement system because it works for most Americans. Together with Social Security, employer-sponsored retirement plans, like 401(k)s, and individual retirement accounts (IRAs) have helped build the middle class, giving millions of everyday Americans a financially secure retirement.

ICI research shows that Americans value their tax-advantaged retirement accounts:

- More than **70%** of retirees rely on a combination of Social Security benefits and income from retirement plans.
- Nearly **three-quarters** of U.S. households have tax-advantaged retirement savings through work or IRAs.

Supporting the Fund Industry's Ability to Innovate to Better Serve Investors

ICI advocates for policies and regulations that **encourage technological and product innovations** that benefit investors and retirement savers. Responsible innovation has democratized access to the markets and investing. For example, the evolution of technology has enhanced accessibility to the financial markets by allowing investors of varied wealth, income, and experience levels to overcome traditional barriers to investing; and product innovations have allowed funds to provide investors with more investment options at lower costs.

Partnering with Policymakers for Sound Regulation

For more than 80 years, ICI has partnered with policymakers and regulators to elevate the voices of long-term investors and retirement savers:

- ICI has supported retirement reforms, including the SECURE and SECURE 2.0 Acts, that have expanded access to employer-sponsored plans and made it easier and cheaper for large and small employers alike to offer their employees retirement plans.
- We have called on the SEC to update the Investment Company Act of 1940 to keep pace with market changes and technological advances—and to generate middle-class wealth creation.

We believe **innovation and incentives improve retirement security**, and we have long supported policy initiatives such as automatic enrollment, automatic escalation, and life-cycle investing that refine the existing system.

Key Resources:



ICI VIEWPOINTS

A Closer Look at the Facts Shows a More Optimistic Outlook for the US Retirement System

March 11, 2025

Tags

Retirement Plans



ICI VIEWPOINTS

Ok, Boomer: Retirement Prospects for Younger Americans Actually Look Bright

February 5, 2024



ICI VIEWPOINTS

Stripping 401(k) Tax Breaks Won't Fix Social Security

November 1, 2024



RESEARCH

Our Strong Retirement System: An American Success Story (pdf)

December 4, 2013

Communicating our Policy Priorities

Ensuring Tax Fairness and Financial Security

ICI advocates for commonsense tax policies that benefit regulated funds and individual investors.

Millions of Americans save for the future through mutual funds and long-term investments. As Americans try to keep up with rising costs, ICI is advocating for policies to help them keep more of their hard-earned money. But every tax season, mutual fund investors are unfairly penalized with a tax bill for capital gains they didn't actually receive.

Key Takeaways:

- Millions of American investors are losing potential returns on their investments because unfair taxes on mutual funds penalize them even if they don't sell a single share.
- The GROWTH Act will end this penalty, finally treating these investments the same as stocks, real estate, or other assets.
- Investors are losing up to 13.4% in returns on an investment over a 10-year period, depending on the type of mutual fund, according to ICI research.
- The penalty discourages long-term investing, which is bad for our economy.
- Congress should pass the GROWTH Act to end this unfair tax penalty, support long-term investing, and help regular Americans retain more of their hard-earned returns.

Under current law, investors in mutual funds and other registered funds held outside of retirement accounts must pay taxes each year on capital gains distributions—even if they didn't sell a single share, and even if those gains were reinvested automatically. That means they're being taxed on money they never really saw, and that tax burden denies them up to \$1,340 in returns (on a \$10,000 investment in an actively managed mutual fund over a 10-year period).

The bipartisan GROWTH Act, introduced in the House and Senate, would let investors defer taxes on automatically reinvested capital gains distributions until they sell their shares—just like people who invest directly in stocks or bonds. Passing the GROWTH Act will end the unfair penalty on millions of investors who rely on mutual funds and other registered funds in their taxable accounts. These Americans should not lose out for doing exactly what policymakers say they should do: saving for the future in well-regulated, diversified investment vehicles.

The GROWTH Act Would Benefit Millions of Americans

According to ICI's [Ownership of Mutual Funds and Shareholder Sentiment, 2025](#) report, 24.8 million households owned mutual funds in taxable accounts in 2025.

The GROWTH Act would largely benefit middle-class Americans, seniors, and retirees:

- More than 50% of the impacted households have less than \$150,000 in household income.
- 45% of households holding long-term mutual funds are 65 or older.
- 13.4% more in returns in investors' pockets after 10 years, on certain investments.

Key Resources:



NEWS RELEASE

Americans Could See Up to \$1,340 More in Mutual Fund Returns Under the GROWTH Act

February 10, 2026



COMMENT LETTER

ICI Letter Urging Passage of the GROWTH Act of 2025

February 10, 2026



OPINIONS

ICI CEO: Washington Should Stop Penalizing Middle-Class Savers

October 3, 2025



FACT SHEET

GROWTH Act - Empower Americans to Invest in Their Future

September 17, 2025

Resource Hubs

Shortened Settlement Cycle Resource Center

The Path to T+1

Together with the Securities Industry and Financial Markets Association (SIFMA) and the Depository Trust & Clearing Corporation (DTCC), ICI has outlined a roadmap to shorten the US securities settlement cycle from trade date plus 2 days (T+2) to trade date plus one day (T+1).

"Shifting to T+1 will strengthen the financial system and offers tangible benefits to investors by reducing their risk exposure and enabling them to more quickly leverage investment opportunities."
ICI President and CEO Eric J. Pan

The effort to shorten the settlement cycle, like the industry move from T+3 to T+2 in 2017, requires collaboration from market participants across the industry. The report targets the first half of 2024 to implement T+1, allowing time for firms to assess the changes they need to undertake, for the industry to conduct comprehensive testing, and for regulators to make the necessary regulatory changes.

The Industry Steering Committee, made up of industry participants (buy-side, sell-side, vendors) led by ICI, SIFMA, and DTCC, recommends that firms begin to work with their counterparties, custodians, vendors, regulators, and clients to better understand internal impacts related to timing requirements and deadlines, system requirements and improvements, and process changes.

Resources

[Accelerating the US Securities Settlement Cycle to T+1](#)

[ICI, SIFMA, and DTCC Lay Out Path to Shorten US Securities Settlement Cycle to T+1 by First Half of 2024](#)

The Investment Company Institute (ICI), the Securities Industry and Financial Markets Association...

[ICI, SIFMA, and DTCC Leading Effort to Shorten US Securities Settlement Cycle to T+1, Collaborating with the Industry on Next Steps](#)

A shorter settlement cycle will benefit investors and market participant firms by reducing systemic...

[Advancing Together: Leading the Industry to Accelerated Settlement \(pdf\)](#)

[Industry Steering Committee Publishes Playbook for Implementing T+2 Settlement Cycle in U.S. by the End of 3Q 2017 \(pdf\)](#)

[ACCESS INFORMATION ON INDUSTRY EFFORTS ON T+2](#)

Resource Hubs



RESOURCE HUB

Shortened Settlement Cycle

This Resource Hub provides information on the Shortened Settlement Cycle.

Overview

The Path to T+1

Together with the Securities Industry and Financial Markets Association (SIFMA) and the Depository Trust & Clearing Corporation (DTCC), ICI led the successful US securities settlement cycle transition from trade date plus 2 days (T+2) to trade date plus one day (T+1).

With the successful transition to T+1 in North America in May 2024, global markets, including the UK and EU, are beginning the steps towards a shortened settlement cycle by October 11, 2027.

ICI is engaged with leaders in the UK and EU to support the asset management industry's transition to this shortened settlement cycle, to better understand internal impacts related to timing requirements and deadlines, system requirements and improvements, and process changes.

Committees and Working Groups

T+1 UK/EU Implementation Working Group

The T+1 UK/EU implementation Working Group will communicate key information from industry steering committees, technical working groups, and authorities to members. Aims to provide a forum for member discussion during the implementation period and enable ICI staff to identify common issues and questions from members that need to be raised in the industry steering committees, technical working groups, or with authorities.

ICI Contacts

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Senior Director, Securities Operations
Email: R.J.Rondini

News & Publications



ICI VIEWPOINTS

From Roadmap to Reality: EU and UK T+1 Transition Webinar

February 27, 2026



NEWS RELEASE

ICI Statement on the EU's Commitment to Move to T+1

February 12, 2025



OPINIONS

EU Markets Need to Commit to Catch up With the US on T+1

October 18, 2024



NEWS RELEASE

ICI Statement on EU & UK Transition to T+1

October 14, 2024

[View All News & Publications](#)

Policy & Regulatory Updates

COMMENT LETTER

ICI Response to HKEX's Paper on Accelerated Settlement for the Hong Kong Cash Market

August 28, 2025

COMMENT LETTER

ICI Comment Letter to Acting Chairman Uyeda Requesting an Extension to US Treasury Compliance Dates

February 24, 2025

COMMENT LETTER

ICI and ICI Global Comment Letter to ESMA's Call for Evidence

December 15, 2023

COMMENT LETTER

ICI Comment Letter to FINRA and MSRB Regarding Shortening Trade Reporting Timeframes

October 3, 2022

COMMENT LETTER

ICI Comment Letter on ESMA's Consultation on Amendments to the RTS on Settlement Discipline

Apr 14, 2025

COMMENT LETTER

ICI Response to the Accelerated Settlement Taskforce Technical Group on T+1 in the UK

October 30, 2024

COMMENT LETTER

ICI and ICI Global Comment Letter to ESMA's Call for Evidence

December 15, 2023

COMMENT LETTER

ICI Comment Letter on CFTC Request for Comment on Swap Clearing Requirements and LIBOR Transition (pdf)

January 24, 2022

Research & Statistics



RESEARCH

Summary of Recent ICI Research on First-Mover Advantage, Dilution, and Systemic Risk in Open-End Funds (pdf)

December 26, 2023



ONE PAGER

Are you Ready for T+1 (pdf)

September 25, 2023



WHITE PAPER

T+1 Securities Settlement Industry Implementation Playbook (pdf)

August 1, 2022

WHITE PAPER

High-Level Roadmap for Adoption of T+1 in EU Securities Markets (pdf)

October 14, 2024

[View All Research & Statistics](#)

Member Resources

MEMOR 2025

ICI Comments on Hong Kong Transition to T+1

August 28, 2025

MEMOR 2024

ICI Responds to ESMA Consultation on Amendments to RTS on Settlement Discipline

Apr 12, 2025

MEMOR 2023

ICI Submits Letter to Acting Chairman Uyeda Requesting Extension of the Treasury Repo Clearing Mandate Under the SEC's Treasury Clearing Rule

February 26, 2025

MEMOR 2023

EU T+1 Updates: Legislative Proposal and Consultation on Amendments to the RTS on Settlement Discipline

February 24, 2026

MEMOR 2023

EU T+1 Updates: Legislative Proposal and Consultation on Amendments to the RTS on Settlement Discipline

February 24, 2025

MEMOR 2021

ICI Response to UK Accelerated Settlement Consultation

November 1, 2024

MEMOR 2023

UK Accelerated Settlement Task Force Technical Group Consultation

October 7, 2024

MEMOR 2023

UK Accelerated Settlement Task Force Technical Group Consultation

October 7, 2024



Happiness Is a Spousal IRA

By Sarah Holden

As Valentine's Day approaches, many wonder how to best express their love. Sure, dozens of roses, chocolates, or a Shakespearean sonnet would bring happiness this Valentine's Day, but you might want to consider—whether for yourself or your spouse—a contribution to an individual retirement account (IRA). Nothing is more romantic than a secure financial future!



These popular retirement savings accounts are used by about 48 million US households to grow and maintain their savings, and our research shows that Americans have more than \$13 billion in assets invested in these accounts. Traditional IRAs are the most common type of IRA, although Roth IRAs have been increasing in popularity.

Happiness Is Opening an IRA

It's not too late to contribute to an IRA for the 2021 tax year. You're allowed to make contributions until Tax Day in mid-April, and a tax-deductible contribution could reduce your 2021 tax bill.

For the 2021 tax year, individuals are limited to \$6,000 in total contributions across all traditional and Roth IRAs. Those 50 or older can contribute an additional \$1,000 (a "catch-up" contribution). Significantly, due to a recent law change, individuals older than 70 can now contribute to traditional IRAs.

Although IRAs have contribution limits, they offer a choice: you can pay taxes now or later. Contributions to traditional IRAs are tax-deferred (subject to certain limits)—that is, no income tax is paid until you withdraw money from the IRA. In contrast, contributions to Roth IRAs are taxable, but no taxes are paid when you make a withdrawal (subject to certain restrictions).

Happiness Is Sharing Your Earnings

If married, you can use your earnings to contribute to either a traditional or Roth IRA for your spouse, in his or her name, to increase tax-advantaged retirement savings for your family. As the IRS explains:

Kristin, a full-time student with no taxable compensation, marries Carl during the year. Neither of them was age 50 by the end of 2021. For the year, Carl has taxable compensation of \$30,000. He plans to contribute (and deduct) \$6,000 to a traditional IRA. If he and Kristin file a joint return, each can contribute \$6,000 to a traditional IRA. This is because Kristin, who has no compensation, can add Carl's compensation, reduced by the amount of his IRA contribution (\$30,000 - \$6,000 = \$24,000), to her own compensation (0) to figure her maximum contribution to a traditional IRA.

Happiness Is Choosing Investments

You can open an IRA with the assistance of investment professionals, such as those at full-service brokerage firms, banks or savings institutions, independent financial planning firms, or insurance companies. You can also go directly to a mutual fund company or use a discount brokerage firm. In 2021, three-quarters of traditional IRA-owning households held their IRAs through investment professionals, and about three in 10 went directly to a mutual fund company or discount broker.

The next step is to decide your investment style. If you're a do-it-yourself type of investor, you can decide from a wide range of investments, including exchange-traded funds (ETFs), mutual funds, and closed-end funds—index or active, domestic or international, equity or bond focused—as well as individual stocks and bonds and bank deposits.

If you'd rather leave the asset allocation and rebalancing to an investment professional, target date funds may be worth considering. A target date fund (also known as lifecycle fund) typically rebalances its portfolio to become less focused on growth and more focused on income as it approaches and passes the target date of the fund, which is usually included in the fund's name. The target date is your expected retirement date.

Happiness Is Walking Hand in Hand

As this Valentine's Day approaches, consider treating yourself or your spouse to an IRA contribution. Saving for retirement is an important household financial goal and contributing to an IRA is a good step toward providing for walking hand in hand in those later years.

Want to know more about IRAs and see which of these options are available to you? Check out ICI's IRA resources, FINRA's IRA Basics, or the IRS website. Many mutual fund sponsors have great educational material as well.

Sarah Holden is ICI's Senior Director of Retirement and Investor Research.

Topics

IRAs Retirement Research Savings Shareholder

How Funds Help Build the American Dream

April 9, 2025 | [Share Article](#) | [Print](#) | [Bookmark](#)

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For many savers, a workplace retirement plan isn't just helpful—it's the reason saving happens at all. ICI's latest national survey on [Americans' views of 401\(k\) and other defined contribution \(DC\) plans](#) shows just how central these plans are to household financial security. As the nation marks its 250th anniversary, ICI is reflecting on what it means to be invested in America, and this survey is a reminder that the systems most vital to Americans' financial security aren't always the most front of mind. By making retirement saving routine and investing accessible, workplace plans help promote the American Dream and give families a pathway from work to long-term opportunity and financial stability.

Workplace Retirement Plans Matter

- 47% of workplace retirement account owners say they probably would not save for retirement without a plan at work.
- 92% say payroll deduction makes it easier to save.
- 83% agree their DC plan offers a good lineup of investment options.

Making it easier to save

Nearly half of DC plan account owners said they probably would not save for retirement without a workplace plan. That number is even higher for people in lower-income households. Automatic contributions through payroll deductions are key to making consistent saving possible.

DC plans also change the way people think about planning for the future. More than 9 in 10 DC account owners surveyed said their plan helps them think about the long term, not just their current needs, and 92% said payroll deduction makes saving easier.

A pathway to opportunity and financial security

For millions of people, workplace plans offer a first experience with long-term investing, helping workers develop confidence in managing their finances over time. DC account owners appreciate the lineup of investment options offered in their plans and benefit from the educational materials provided.

Regular contributions also help workers deal with market volatility. More than 8 in 10 DC account owners agreed that knowing they save from every paycheck makes them less worried about short-term investment performance. By investing their contributions in funds, Americans gain a diversified ownership stake in the economy—and a way to participate in its long-term growth.

Americans want to protect what works

The survey results indicate broad public support for preserving DC plans. A strong majority, 87%, oppose eliminating the tax advantages of DC accounts, and large majorities oppose reducing contribution limits. Respondents also value individual control. More than 9 in 10 agree that retirees should be able to make their own decisions about managing retirement assets and income. And about 8 in 10 oppose proposals to invest all retirement accounts through an option selected by a government-appointed board.

Americans want to preserve workplace retirement plans

- 87% of Americans oppose eliminating the tax advantages of DC accounts.
- 77% are confident that 401(k) and other employer-sponsored retirement plan accounts can help people meet their retirement goals.

This strong support is not limited to people who already have retirement accounts. Even among individuals whose households do not currently own a DC plan account or an individual retirement account (IRA), large majorities oppose eliminating (or reducing) the tax advantages. This breadth of support suggests sustained public confidence in a system that helps workers build long-term financial security.

Survey Methodology

ICI research staff designed the survey, and NORC at the University of Chicago administered the survey using the AmeriSpeak® probability-based panel. The national survey, conducted in November and December 2025, covered a total sample of 2,175 individuals aged 18 or older in the United States. Survey results are weighted to be representative of the total population of Americans aged 18 or older. The overall margin of sampling error for the 2025 sample is ± 2.1 percentage points at the 95% confidence level. Read more at ["American Views on Defined Contribution Plan Saving, 2025"](#).

Tags

[Retirement Plans](#)

[America250](#)



Author pages



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Areas of Expertise:

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[Retirement Policy](#)

[IRAs](#)

[Retirement Plan Participation](#)

[Retirement Research](#)

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Viewpoints by this Author

[How Funds Help Build the American Dream](#)

[Retirement Asset Ownership Is Widespread Among Gig-Worker Households](#)

[Funds Democratize Investing in the United States](#)

[The Wealth-Building Power of 401\(k\) Plans](#)

[American Investors Agree: Let's Make E-Delivery the Default](#)

[IRA Ownership Reaches Record Highs](#)

[The New Face of Fund Ownership: A Bigger and More Diverse Marketplace](#)

[Revolutionizing Retirement](#)

[Ok, Boomer: Retirement Prospects for Younger Americans Actually Look Bright](#)

[How Do ETF and Mutual Fund Investors Differ?](#)

[Savers Remain Focused on Retirement Goals Through Market Turbulence](#)

[Running 401\(k\)](#)

[Navigating Through Financial Storms: American Savers' Handling of Retirement Planning Through COVID](#)

[Americans' Financial Response to COVID](#)

[Happiness Is a Spousal IRA](#)

[Jump In for Mutual Fun](#)

**We're not
done yet!**



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