

**MEMO# 30044**

July 18, 2016

## **Registration Now Open: October 13-14, 2016 Internal Sales Managers Roundtable Meeting**

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TO: INTERNAL SALES MANAGERS ROUNDTABLE No. 5-16 RE: REGISTRATION NOW OPEN:  
OCTOBER 13-14, 2016 INTERNAL SALES MANAGERS ROUNDTABLE MEETING

The Investment Company Institute's Internal Sales Managers Roundtable will meet on Thursday, October 13, from 9:00 am to 3:00 pm, and on Friday, October 14, from 8:30 to 11:30 am. The meeting will take place at the offices of Franklin Templeton Investments at One Franklin Parkway, Building 970, 1st floor, in San Mateo, CA. A continental breakfast will be provided on both October 13 and 14 and lunch will be provided on October 13.

A meeting agenda will be mailed to you in August. Meeting topics will include:

- The impact of the DOL Fiduciary Rule on fund distribution
- Maximizing the value of your CRM system
- How technology and big data can make the job of an internal wholesaler more efficient
- The evolving sales process/internal sales productivity

### **Meeting Registration**

Online registration for the meeting is available at [www.ici.org/reg/ismr](http://www.ici.org/reg/ismr). Registration is limited to two representatives per member firm.

### **Hotel Arrangements**

A block of rooms has been reserved at the Sofitel San Francisco Bay for meeting registrants. The hotel's address is 223 Twin Dolphin Drive in Redwood City, CA. Detailed information about the hotel is available at <http://www.sofitel.com/san-francisco-bay/>. To make your hotel reservations, please call the hotel directly at 650-598-9000 prior to the cutoff date of September 21, 2016 and mention that you are calling as part of the Investment Company Institute room block in order to receive the discounted rate of \$269/night plus tax.

The hotel is approximately 12 miles from the San Francisco Airport and three miles from the

offices of Franklin Templeton.

### **Committee Dinner**

An optional networking reception and dinner will be held on Thursday, October 13, at the Kingfish Restaurant, which is located at 201 South B Street in San Mateo, CA—approximately six miles from the Sofitel Hotel. The restaurant's web address is <http://www.kingfish.net/>. The cost to attend the dinner is \$105. You may register for the dinner when you complete your meeting registration. Please note that if you cancel a dinner registration with less notice than three business days, the \$105 fee will NOT be refunded.

### **Miscellaneous**

Business casual attire will be appropriate for both the meeting and the dinner. If you have any logistical questions about the October 13-14, 2016 meeting or the associated dinner, please contact Caitlin Sneff-Nuckles at 202-326-5970 or [Caitlin.SneffNuckles@ici.org](mailto:Caitlin.SneffNuckles@ici.org). Please contact me with suggestions for the meeting agenda.

I look forward to seeing you in San Mateo, CA, in October.

Linda Brenner  
Director, Distribution Management & Operations

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