

MEMO# 23747

September 1, 2009

October 29-30, 2009 Internal Sales Managers Roundtable Meeting

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TO: INTERNAL SALES MANAGERS ROUNDTABLE No. 8-09 RE: OCTOBER 29-30, 2009
INTERNAL SALES MANAGERS ROUNDTABLE MEETING

The fall 2009 meeting of the Investment Company Institute's Internal Sales Managers Roundtable has been scheduled for 1:00 pm to 5:00 pm on Thursday, October 29, and from 8:30 am to 12:30 pm on Friday, October 30, 2009, at the offices of Fidelity Investments Institutional Services Co. at 500 Salem Street in Smithfield, RI. Lunch will be available at the conclusion of Friday's portion of the meeting.

Meeting Topics

The following are among the topics that will be addressed at the Roundtable meeting:

- Hybrid wholesaling: What's being done, responsibilities, results, customer segmentation, etc.
- Virtual engagements with financial advisors: Experiences to date and long-term implications
- Call campaigns and initiatives
- How to manage redemptions at the firm level
- The growing demands on internal wholesalers—What skills sets are necessary? How to help internals manage their day.
- Recognition/motivation strategies that lead to higher rates of retention/productivity

- Managing multiple generations in the workforce

Meeting Registration

Online registration for the meeting is available at <http://members.ici.org/reg/roundtable>.

Hotel Arrangements

A block of rooms has been reserved for meeting attendees at the Westin Providence, which is located at One West Exchange Street in Providence, RI. Detailed information about the hotel is available at

<http://www.starwoodhotels.com/westin/property/overview/index.html?propertyID=1049>. To make your hotel reservations, please call the hotel directly at 1-800-WESTIN (1-800-937-8461) and mention that you are calling as part of the Investment Company Institute room block in order to receive the discounted rate of \$129/night plus tax.

The Westin Providence is a 15-20 minute drive from Fidelity's offices in Smithfield, RI. Consequently, we have arranged for a bus to take meeting attendees to and from the Westin and Fidelity's offices on both October 29 and 30. At the conclusion of the meeting on Friday, October 30, the bus will take interested members back to the Westin and then will proceed to the T.F. Green airport in Warwick, RI. For those who would prefer to drive directly to Fidelity's offices in Smithfield, free parking is available.

Committee Dinner

The optional networking reception and dinner on Thursday, October 29, will be held at the Mediterraneo restaurant, which is located at 134 Atwells Ave in Providence, RI. The beer/wine reception will begin at 6:30 pm and dinner at 7:00 pm. The telephone number for the Mediterraneo is 401-331-7760. The restaurant's website address is <http://www.mediterraneocaffe.com/>. The Mediterraneo is approximately ½ mile from the Western Providence.

The cost of the dinner is \$85. 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 \$85 fee will NOT be refunded.

Miscellaneous

If you have any questions about the October meeting, please contact me at 202/326-5883 (email: brenner@ici.org). We look forward to seeing you in October.

Linda Brenner
Director
Operations and Continuing Education

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