

MEMO# 29191

July 23, 2015

Registration Now Open: October 27-28, 2015 Internal Sales Managers Round Table Meeting

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TO: INTERNAL SALES MANAGERS ROUNDTABLE No. 7-15 RE: REGISTRATION NOW OPEN: OCTOBER 27-28, 2015 INTERNAL SALES MANAGERS ROUND TABLE MEETING

The Investment Company Institute's Internal Sales Managers Roundtable will meet on Tuesday, October 27, 2015, from 2:00 – 5:00 pm and on Wednesday, October 28, from 8:30 am - 1:00 pm at ICI's offices on the 12th floor of 1401 H Street, NW, in Washington, DC. Light refreshments will be provided on October 27, a continental breakfast will be available beginning at 8:00 am on October 28, and the meeting will conclude with a buffet lunch. A meeting agenda will be sent to you closer to the meeting date.

Meeting Steering Committee and Structure:

I am pleased to report that several Internal Sales Managers Roundtable members (Cheri Belski, T. Rowe Price; Phil Gaechter, Nuveen Investments; Jenine Garrellick, MFS; Jared Piche, AB) are serving as a steering committee to help plan the agenda for ICI's October 27-28, 2015, Roundtable meeting. The theme of this meeting is Optimizing Your Sales Desk. The meeting will feature both member-led discussions and breakout sessions. All meeting attendees are expected to prepare in advance so that they will be able to fully participate in or lead discussions on the following topics:

- Resource limitations: Doing more with less
- The physical layout of your sales desk
- Managing employees who work remotely
- Building strong working relationships with Marketing, National Accounts, Data Analytics, etc.
- Gaining advisor mindshare
- Measuring the success of territory pairings, i.e., the internal/external partnership

Meeting Registration:

To ensure that all attendees have the opportunity to fully participate in all discussions, attendance at the Roundtable meeting is limited to two individuals per member firm. Registration is available at www.ici.org/reg/ismr. When registering, please provide any

topics you would like addressed at the meeting that are not reflected in the above-mentioned list.

Meeting Logistics:

- An optional networking dinner for meeting attendees will be held on Tuesday, October 27, (reception at 6:30 pm and dinner at 7:15 pm) at the restaurant District Chophouse, which is located at 509 7th St, NW, in Washington, DC. The restaurant's phone number is 202- 347-3434, and the website address is <http://www.districtchophouse.com>. The cost to attend the reception and dinner is \$105. Please note that if you cancel a dinner registration with less than three business days' notice, the \$105 will NOT be refunded.
- A block of rooms has been reserved at the Sofitel Hotel for meeting attendees. The Sofitel, which is located at 806 15th St, NW, in Washington, DC, is less than a one-block walk to ICI's offices. To make your hotel reservation, please call the hotel directly at 202-730-8800 prior to the cutoff date of October 6, 2015. Mention your Investment Company Institute affiliation in order to receive the \$345 plus tax room rate.
- Business attire will be appropriate for the two-day committee meeting and business casual attire for the dinner.
- Please note that ICI's building security procedures require that all meeting attendees check in at the first floor security desk where they will be met by ICI staff, who will facilitate elevator access to ICI's offices. Visitors will NOT be able to use the elevators without the assistance of ICI staff. If you arrive at the building after the meeting begins at 8:30 am on Wednesday, October 28, please call ICI's main reception number at 202-326-5800 to request an escort to the 12th floor.

If you have any questions about the October 27-28, 2015, meeting or suggestions for agenda, please contact me at 202-326-5883 or brenner@ici.org with.

We look forward to seeing you in October.

Linda Brenner
Director, Distribution Management & Operations