

MEMO# 28269

July 16, 2014

Registration Now Open: September 17, 2014 Sales Force Marketing Committee Meeting

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TO: SALES FORCE MARKETING COMMITTEE No. 8-14 RE: REGISTRATION NOW OPEN:
SEPTEMBER 17, 2014 SALES FORCE MARKETING COMMITTEE MEETING

The Investment Company Institute's Sales Force Marketing Committee will meet on Wednesday, September 17, 2014, at ICI's offices on the 12th floor of 1401 H Street, NW, in Washington, DC 20005. A continental breakfast will be available beginning at 8:00 am, lunch will be provided at approximately 12:30 pm, and the meeting will end at approximately 1:00 pm.

Meeting highlights will include member panels exploring the following topics:

- Alternative approaches to measuring and rewarding key sales professionals,
- Servicing models for advisory v. commission-based advisors, and
- The national account role.

Also, ICI's Chief Economist Brian Reid will provide an economic update focusing on active v. passive product flows and how demographics are impacting demand for bond funds. A meeting agenda will be sent to you closer to the meeting date.

Building Security

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, please call ICI's main reception number at 202-326-5800 to request an escort to the 12th floor.

Networking Dinner

An optional networking dinner for meeting attendees will be held on Tuesday evening, September 16 (reception at 6:30 pm and dinner at 7:15 pm) at a restaurant TBA. The cost to attend the 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.

Meeting Registration

Committee members should register for the Sales Force Marketing Committee meeting and the networking dinner at www.ici.org/reg/sfmc. When registering, please provide any topics you would like addressed at the meeting. Please note that meeting attendance is limited to two individuals per member firm.

Hotel

A block of rooms has been reserved at the Hamilton Crowne Plaza Hotel for meeting attendees. The Crowne Plaza, which is located at 14th and K Streets, NW, in Washington, DC, is a very short walk to ICI's office. To make your hotel reservation, please call the hotel directly at 800/315-2621 prior to the cutoff date of August 18, 2014. Please mention your Investment Company Institute affiliation in order to receive the \$349 room rate. Note that there is a major convention in Washington, DC, during the week of our meeting. Hotel rooms may be difficult to book so please make your reservations as soon as possible.

Miscellaneous

Business attire will be appropriate for the committee meeting and business casual attire for the dinner.

If you have any logistical questions about the September 17 meeting or the associated dinner, please contact Raquel Canales at 202/326-5970 or raquel.canales@ici.org. Please contact Linda Brenner at 202/326-5883 or brenner@ici.org with suggestions for the meeting agenda. We look forward to seeing you in September.

Jim Jessee
President
MFS Fund Distributors Linda Brenner
Director, Distribution Management & Operations

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