

**MEMO# 23688**

August 10, 2009

## **Preliminary Agenda: September 24, 2009 Sales Force Marketing Committee Meeting**

[23688]

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TO: SALES FORCE MARKETING COMMITTEE No. 7-09    RE: PRELIMINARY AGENDA:  
SEPTEMBER 24, 2009 SALES FORCE MARKETING COMMITTEE MEETING

Attached is a preliminary agenda for the September 24, 2009 meeting of the Investment Company Institute's Sales Force Marketing Committee. As you will note, we will be addressing a number of timely and important topics at the meeting, including the RIA marketplace, advisor contact and engagement preferences, and timely compliance issues. We look forward to everyone's participation in these discussions.

The September 24th meeting will run from 8:30 am to Noon at ICI's offices at 1401 H Street, NW, in Washington, DC. A continental breakfast will be available beginning at 8:00 am and a buffet lunch will be available immediately after the meeting.

### **Meeting Registration**

If you have not yet registered for the September 24th meeting, please do so as soon as possible at <http://members.ici.org/reg/salesforce>.

## **Networking Dinner**

An optional networking dinner for meeting attendees will be held on Wednesday evening, September 23, at the Occidental Restaurant (beer and wine reception at 6:30 pm and dinner at 7:00 pm). The Occidental Restaurant is located at 1475 Pennsylvania Avenue, N.W., in Washington, DC, and is a brief walk from the Crowne Plaza and ICI's offices. The restaurant's phone number is (202) 783-2856, and the web address is <http://www.occidentaldc.com/occidental/index.cfm>. The cost to attend the reception and dinner is \$85. Please note that if you cancel a dinner registration with less than three business days notice, the \$85 will NOT be refunded.

## **Hotel**

A block of rooms has been reserved at the Hamilton Crowne Plaza 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 800/263-9802 and mention your Investment Company Institute affiliation in order to receive the \$259 room rate.

## **Other**

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

If you have any questions about the September 24, 2009 meeting, please contact Linda Brenner at 202/326-5883 (email: [brenner@ici.org](mailto:brenner@ici.org)). We look forward to seeing you in September.

Peter Jones  
President  
Franklin Templeton Distributors, Inc. Linda Brenner  
Director, Operations & Continuing Education  
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[Attachment](#)