

MEMO# 22688

July 14, 2008

September 18, 2008 Sales Force Marketing Committee Meeting

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TO: SALES FORCE MARKETING COMMITTEE No. 2-08 RE: SEPTEMBER 18, 2008 SALES FORCE MARKETING COMMITTEE MEETING

The next meeting of the Investment Company Institute's Sales Force Marketing Committee is scheduled for Thursday, September 18, 2008 from 8:30 am to Noon at ICI's offices at 1401 H Street, NW, Washington, DC. Lunch will be available immediately after the meeting. Topics that will be explored at the meeting include:

- Rule 12b-1 reform proposals
- Compensation trends for wholesalers (internal and external)
- E-business strategies
- How advisers are using alternative investments to construct portfolios

Compliance Professionals Invited to Attend Meeting

The committee's February 2008 meeting featured a very lively discussion about the compliance challenges committee members are facing. The participation of several compliance professionals from member firms added to the value of the discussions. Consequently, we would like committee members to invite the compliance professional from their firm who works most closely with the sales organization to attend the September meeting.

Meeting Registration

Committee members and compliance professionals should register for this meeting and the networking dinner at <http://members.ici.org/reg/salesforce>.

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 \$329 room rate.

Networking Dinner

An optional networking dinner for meeting attendees will be held on Wednesday evening at The Caucus Room (reception at 6:30 pm and dinner at 7:00 pm). The Caucus Room is located at 401 9th Street, NW, Market Square North, in Washington, DC. The restaurant's phone number is 202/393-1300 and the web address is www.thecaucusroom.com. The cost to attend the reception and dinner is \$85. Please note that if you cancel a dinner registration with less than 72 hours notice, the \$85 will NOT be refunded.

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 18, 2008 meeting, please contact me at 202/326-5883 (email: brenner@ici.org). We look forward to seeing you in September.

Peter Jones
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Director
Operations & Continuing Education
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