

MEMO# 32077

December 12, 2019

Registration Now Open: February 27, 2020 Sales and Marketing Committee Meeting

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The Investment Company Institute's Sales and Marketing Committee will meet on Thursday, February 27, 2020, at ICI's offices on the 12th floor of 1401 H Street, NW, in Washington, DC. A continental breakfast will be available beginning at 8:00 am, a lunch will be provided at approximately 12:20 pm, and the meeting will end at 1:00 pm. ICI's building security procedures require that all meeting attendees check in at the first-floor security desk.

Meeting Agenda

A meeting agenda will be sent to you closer to the meeting date. Sessions will include:

- A presentation on economic and market trends and the ETF marketplace by Shelli Antoniewicz, ICI's senior director of industry and financial analysis
- A panel moderated by Rachel Jacobs, managing director and head of US intermediary distribution, Macquarie Investment Management, on the SEC's Standards of Conduct for investment professionals
- A panel featuring representatives from intermediary firms exploring the rise of third-party/home office models and alternative strategies
- A presentation by Mark Manassee, senior advisor, McKinsey & Co., on common misperceptions about the financial advisor experience

Meeting Registration

Committee members should register for the Sales and Marketing Committee meeting and the February 26 networking dinner at www.ici.org/reg/smc. When registering, please provide any topics you would like addressed at the meeting.

Hotel

A block of rooms has been reserved at the Sofitel Hotel in Washington, DC, for meeting attendees. The Sofitel, which is located at 806 15th Street 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 February 5, 2020. (Note: The hotel block is likely to fill

prior to this date.) Please mention your Investment Company Institute affiliation in order to receive the \$259 plus tax room rate.

Networking Dinner

An optional networking dinner for meeting attendees will be held on Wednesday evening, February 26 (reception at 6:30 pm and dinner at 7:15 pm) at The Hamilton, located at 600 14th Street, NW, Washington, DC 20005. The cost to attend the dinner is \$115. **Please note that if you cancel a dinner registration with less than three business days' notice, the \$115 will NOT be refunded.**

Miscellaneous

Business casual attire will be appropriate both the committee meeting and dinner. If you have any logistical questions about the February 27 meeting or the associated dinner, please contact Dom Liberatore at 202-326-5970 or dom.liberatore@ici.org. Please contact Linda Brenner with suggestions for the meeting agenda. We look forward to seeing you in February 2020.

Jeffrey Duckworth

Chair - Sales and Marketing Committee

President of Intermediary Distribution - John Hancock Investments

Linda Brenner

Senior Director, Account Management

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