

MEMO# 23624

July 13, 2009

Registration Now Open: September 24, 2009 Sales Force Marketing Committee Meeting

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TO: SALES FORCE MARKETING COMMITTEE No. 5-09 RE: REGISTRATION NOW OPEN:
SEPTEMBER 24, 2009 SALES FORCE MARKETING COMMITTEE MEETING

The next meeting of the Investment Company Institute's Sales Force Marketing Committee is scheduled for Thursday, September 24, 2009, 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 Agenda

Agenda items will include:

- The blurring of the lines of distribution, with an emphasis on the RIA channel
- Effective marketing strategies in the current environment, including advisor segmentation and internal management of the CRM system
- A compliance update targeted to sales and marketing professionals

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://occidentaldc.com/www/>. 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.

Meeting Registration

Committee members should register for the dinner and meeting 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 \$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 me at 202/326-5883 (email: brenner@ici.org). We look forward to seeing you in September.

Peter Jones
President
Franklin Templeton Distributors, Inc. Linda Brenner
Director, Operations & Continuing Education
Investment Company Institute

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