

MEMO# 2802

May 29, 1991

THIRD ANNUAL TELEPHONE CENTER MANAGEMENT SKILLS SEMINARS- ADVANCE NOTICE

May 29, 1991 TO: MEMBERS - ONE PER COMPLEX NO. 21-91 OPERATIONS MEMBERS NO. 12-91 DIRECT MARKETING COMMITTEE NO. 17-91 MARKETING COMMITTEE NO. 22-91 RESEARCH COMMITTEE NO. 15-91 SALES FORCE MARKETING COMMITTEE NO. 18-91 SHAREHOLDER COMMUNICATIONS COMMITTEE NO. 15-91 SMALL FUNDS COMMITTEE NO. 7-91 MEMBERS INTERESTED IN PUBLIC INFORMATION NO. 8-91 RE: Third Annual Telephone Center Management Skills Seminars- Advance Notice

For the third consecutive year, the Institute will hold its series of regional one-day seminars for those who manage and supervise fund telephone representatives. This year, the seminars will be held in four cities, Minneapolis, Boston, Los Angeles, and New York in July and August. They will feature presentations on ways to improve the supervisory and management skills of those who run shareholder service and wholesaler support sales and service telephone centers. Speakers will include industry executives, as well as outside experts. Each seminar will also include small group discussions, during which attendees can meet and discuss areas of common concern with small groups of telephone center managers and supervisors from other fund groups. Registration for these seminars will be limited to employees of ICI member organizations and their transfer agents and telemarketing firms. Please register early, as space will be limited and it may not be possible to accommodate walk-in registrations. Topics to be Covered These seminars will focus on providing attendees with ideas that they can use in the management of their own telephone centers. Topics to be covered include: * Ideas for Gaining the Support of Senior Management for Your Telephone Center * Interviewing, Hiring, and Compensating Fund Telephone Representatives * Training Sales and Service Representatives * Motivating Fund Telephone Representatives * The Regulatory Aspects of Running a Fund Telephone Center * Group Discussions Dates and Locations o Minneapolis July 10 Hotel Sofitel Minneapolis 5601 W. 78th Street Minneapolis, MN 55439-3899 612/835-1900 o Boston July 16 The Colonnade Hotel 120 Huntington Avenue Boston, MA 02116 617/424-7000 o Los Angeles July 30 Los Angeles Airport Hilton 5711 West Century Boulevard Los Angeles, CA 90045 213/410-4000 o New York August 7 New York Marriott Eastside 525 Lexington Avenue New York, NY 10017 212/755-4000 Lunch will be served. All seminars will begin at 9:30 am, and end at approximately 4:00 pm. How to Register To register, fund group employees should complete the attached registration form and return it, along with a check for \$175 for the first registration from the fund group, and \$100 for each additional registration from the same fund group. Non-members should submit a check for \$250 for each registration, as well as a letter from an ICI member stating the relationship of the registrant to the ICI member firm. Mail to: Mr. Geoffrey Burke

Investment Company Institute 1600 M Street NW - Suite 600 Washington, DC 20036 More Information For more information on the program for these seminars, please call me at 202/955-3536. For more information on how to register for these seminars, call Geoffrey Burke at 202/955-3508. Stephanie Brown Marketing Director REGISTRATION FORM INVESTMENT COMPANY INSTITUTE 1991 TELEPHONE CENTER MANAGEMENT SKILLS SEMINARS LOCATION (check one) Minneapolis ☐ Boston ☐ (July 10) (July 16) Los Angeles ☐ New York ☐ (July 30) (August 7) PLEASE TYPE OR PRINT Name(s) and Title(s)

_____ Name of Organization _____

ICI Member Firm (if different)* _____ Address _____

_____ City, State, Zip _____

Telephone Registration Fee ☐ \$175 First Registrant from Institute Member Organization
☐ \$100 Each Additional Registrant from Same Member Organization ☐ \$250 Each Non-Member Registration ☐ Total Fees (Check made out to Investment Company Institute)

Return to: Mr. Geoffrey Burke INVESTMENT COMPANY INSTITUTE 1600 M Street, NW - Suite 600 Washington, DC 20036 * Non-members: Please supply a letter from a member stating business relationship.

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