

MEMO# 4526

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NEW BROCHURE AND SLIDESHOW: TIME TO CELEBRATE LIFE -- INVESTING FOR RETIREMENT WITH MUTUAL FUNDS

February 25, 1993 TO: MEMBERS - ONE PER COMPLEX NO. 14-93 DIRECT MARKETING COMMITTEE NO. 13-93 PUBLIC INFORMATION COMMITTEE NO. 12-93 RESEARCH COMMITTEE NO. 7-93 SALES FORCE MARKETING COMMITTEE NO. 15-93 SHAREHOLDER COMMUNICATIONS COMMITTEE NO. 12-93 SMALL FUNDS COMMITTEE NO. 3-93 BROKER/DEALER ASSOCIATE MEMBERS NO. 7-93 RE: New Brochure and Slideshow: Time to Celebrate Life -- Investing for Retirement with Mutual Funds

Enclosed is a copy of the Institute's new brochure on retirement plans and investing for retirement with mutual funds. Designed to be used either as a companion to the Institute's new retirement planning slideshow or as a stand-alone piece, the brochure outlines the questions investors need to ask about their pension plan options, types of retirement plans, the need for retirement planning and the benefits of mutual funds. It also features case studies of five investors examining their pension options. The visual theme of celebration developed throughout the brochure underscores the potential rewards of careful planning. This brochure is designed for use with individual investors and employees, as well as brokers, financial planners, wholesalers, and telephone representatives. You may also wish to use it with employers, including employee benefits managers. Time to Celebrate Life has been cleared for use as generic sales literature by the National Association of Securities Dealers, Inc. (NASD). Please refer to the enclosure for specific NASD instructions. Additional copies of the Time to Celebrate Life brochure are available for 45 cents each. The Time to Celebrate Life slideshow (80 slides) is available for \$55.00, including script. Synchronized audiotapes of the script cost \$25.00. Use the enclosed flyers to place your order. Please call me with any comments or questions. Barbara Levin Director - Sales Force Marketing and Financial Planning Services