

**MEMO# 1032**

March 10, 1989

## **RESEARCH SEMINAR - CHANNELS OF DISTRIBUTION**

March 10, 1989 TO: PUBLIC INFORMATION COMMITTEE NO. 6-89 RESEARCH COMMITTEE NO. 6-89 MARKETING COMMITTEE NO. 6-89 SHAREHOLDER COMMUNICATIONS COMMITTEE NO. 6-89 MEMBERS - ONE PER COMPLEX NO. 6-89 DIRECT MARKETING COMMITTEE NO. 8-89 SALES FORCE MARKETING COMMITTEE NO. 7-89 RE: RESEARCH SEMINAR - CHANNELS OF DISTRIBUTION \_\_\_\_\_ Institute

members are invited to participate in a series of regional marketing research seminars being offered this Spring. The basic purpose of the seminars is to acquaint members with the main findings of the Institute's research project on channels of distribution for mutual funds and to demonstrate ways in which member firms can utilize the material in developing their own distribution strategies. The Institute has recently completed this extensive research project which identified the attitudes, characteristics and other variables that link mutual fund owners to specific distribution channels. The study is particularly timely since, in recent years, mutual fund firms have sought to compete more effectively in the financial services marketplace by offering consumers an increasing number of ways to buy funds and a wider range of sales charges and services from which to choose.

Discussion of some of the main findings from this research will provide practical information on distribution channels which will help funds assess their present mode of selling mutual funds. The presentation will begin promptly at 10:30 A.M. At a specific point the meeting will be opened to questions and general discussion of the research. A lunch will be provided for all attendees which will allow for additional informal discussion of the issues. There will also be a demonstration of software that has been designed to allow members access to the large database from this research. We anticipate concluding the seminar no later than 2:00 P.M. DATES AND LOCATIONS o April 18 Omni Parker House, Boston o April 19 Marriot Marquis, New York o May 3 Hotel Nikko, Chicago WHO SHOULD ATTEND ICI Members Only:

o Those responsible for all areas of research o Those involved with sales and promotion o Statisticians and Analysts o Economists o Those responsible for communicating with the press, the public, and shareholders o Those involved with product development o Those involved with developing marketing campaigns and tactics HOW TO REGISTER o Chicago seminar registrants: Use the attached yellow form o New York seminar registrants: Use the attached green form o Boston seminar registrants: Use the attached blue form NOTE:

Attendees will be responsible for making their own hotel reservations. Blocks of rooms have been set aside at each hotel should this be needed. See the attached registration forms for hotel names and telephone numbers. FOR MORE INFORMATION For registration information contact Claire Gurnee in the Institute's Administration Department; direct other questions to Sandy West, Director of Marketing Research. Jacob J. Dreyer Vice President & Chief Economist

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