

MEMO# 4333

December 18, 1992

PRELIMINARY AGENDA FOR JANUARY 15, 1993 MEETING

December 18, 1992 TO: SALES FORCE MARKETING COMMITTEE NO. 48-92 RE: Preliminary Agenda for January 15, 1993 Meeting

Enclosed is a preliminary agenda for the next meeting of the Sales Force Marketing Committee scheduled for Friday, January 15, 1993, 8:30 a.m., at the Hotel del Coronado, Coronado, California (near San Diego). Under separate cover you have received a registration form for this meeting and for related marketing and research committee meetings and joint sessions to be held between January 13 and 15. If you plan to attend but have not already signed up, I hope you will do so as soon as possible. As you prepare for the meeting, I'd appreciate your thoughts and suggestions about two Institute publications designed for your customers. Whether or not you plan to attend on January 15, I hope you will fill out the attached question sheet and return it to me by mail or in person at the meeting. The first question supports an effort to keep the TIPS column of Mutual Fund News useful to you and your customers. The second is an assessment of the need for a consumer's version of Matching Mutual Funds. A longstanding feature of our generic mutual fund sales and marketing newsletter, the TIPS column is a vehicle for financial planners, counselors, and other financial services professionals in the field to share sales and marketing ideas. Traditionally we have avoided references to specific products and mutual fund groups, sales scripts and specific sales techniques. To familiarize you with the column I've enclosed three recent examples. Will you please let us know what future topics will be helpful to the brokers and planners through whom you distribute. Topics and suggestions for the newsletter in general are also welcome. Matching Mutual Funds (also enclosed) has been a popular sales training tool for more than seven years. I am happy to report that a consumer version of Matching Mutual Funds is now in the works, but we need your help in determining quantity. On the enclosed sheet will you also please estimate the quantity your organization and/or those through which you distribute would purchase in 1993-94. The consumer version of Matching Mutual Funds will sell for \$1.00 (90 cents apiece for quantities over 100). Thanks for your help, and enjoy the holiday season. I look forward to seeing you in San Diego next year. Barbara Levin Director- Sales Force Marketing and Financial Planning Services Enclosures