

MEMO# 12525

August 23, 2000

FINAL NOTICE: SEPTEMBER 14-15, 2000 ROUNDTABLE MEETING; SALES TRAINERS

[12525] August 23, 2000 TO: SALES DESK MANAGERS ROUNDTABLE No. 5-00 RE: FINAL NOTICE: SEPTEMBER 14-15, 2000 ROUNDTABLE MEETING; SALES TRAINERS Attached is an agenda for the September 14-15, 2000 meeting of the Investment Company Institute's Sales Desk Managers Roundtable. If you have not yet returned your reservation form to the Institute, please do so as soon as possible so that we can finalize our arrangements for the meeting and for the optional networking dinner. On Thursday, September 14th, the meeting will run from 9:00 am - 3:00 pm at the offices of American Funds at 3500 Wiseman Boulevard in San Antonio. On Friday, September 15th, the Roundtable will tour the offices of American Funds from 9:00-10:00 am and then meet from 10 am to noon. A block of rooms has been reserved for meeting attendees at the Hyatt Regency Hill Country Resort, which is located at 9800 Hyatt Resort Drive; telephone number: 210/647-1234. The hotel is approximately 30 miles from the San Antonio International Airport. Transportation by taxi from the airport to the hotel is approximately \$28. Shuttle service from the airport to the hotel is available via Worldtrans Charter (telephone: 210/520-4083). Detailed information about the hotel, including maps, are available on the Hyatt's website at <http://www.hyatt.com>. To make your room reservation, please call the Hyatt Regency Hill Country Resort directly and mention that you will be attending an Institute meeting. Transportation to and from the Hyatt and the offices of American Funds will be provided. The bus will leave the lobby of the Hyatt at 8:35 am each day and return to the Hyatt immediately following the end of each day's meeting (3:00 pm on Thursday and noon on Friday). After briefly returning to the Hyatt on Friday, the bus will go directly to the airport. The optional networking dinner on Thursday will begin at 6:30 pm at Paesano's on the Riverwalk at 111 W. Crockett in San Antonio (telephone: (210/227-2782). Transportation will be provided to and from the dinner and will leave the lobby of the Hyatt at 5:45 pm. Please note that business casual attire will be appropriate for the meetings, casual attire for the dinner. I have also enclosed information about firms that provide sales and presentation training to the financial services industry. This list was compiled at the request of the Institute's Sales Force Marketing Committee and will be maintained by the Institute's Training Group. We are interested in being as inclusive as possible so if you've had experience with other firms that provide quality sales or 2presentation training, please let me know (telephone: 202/326-5883, email: brenner@ici.org or simply return the enclosed information form). We look forward to seeing you in September. Linda Brenner Director, Operations and Training Attachments Attachment no. 1 (in .pdf format)

Copyright © by the Investment Company Institute. All rights reserved. Information may be abridged and therefore incomplete. Communications from the Institute do not constitute, and should not be considered a substitute for, legal advice.