

**MEMO# 8014**

June 28, 1996

## **TRANSFER AGENT: BASIC TRAINING COURSE NOW AVAILABLE**

June 28, 1996 TO: COMPLIANCE COMMITTEE No. 16-96 HUMAN RESOURCES FORUM No. 4-96 MEMBERS - ONE PER COMPLEX No. 55-96 MEMBERS INTERESTED IN CONTINUING EDUCATION/TRAINING No. 6-96 OPERATIONS MEMBERS No. 31-96 TRANSFER AGENT ADVISORY COMMITTEE No. 36-96 RE: TRANSFER AGENT: BASIC TRAINING COURSE NOW AVAILABLE \_\_\_\_\_ A

A new training course on the types, organization, and functions of a mutual fund transfer agent is now available from the Institute. The new program, Transfer Agent: Basic Training, is a two-to three-hour video-based training course that may be used for either group or self-paced learning. It has been designed to assist employees of fund groups, transfer agents, banks, and others who require a basic understanding of the roles played by mutual fund transfer agents. Course materials include a videotape, student workbook, and leaders guide (with optional group activities and discussion topics). A glossary, final exam, and answer key are also provided. Enclosed is more information on the topics covered in Transfer Agent: Basic Training, as well as an order form. For more information on this course, or the Institutes other training and continuing education programs, please consult the Institutes Catalog of Training Materials for Financial Industry Professionals. For a copy of the catalog, please call Kristin Stierle at 202/326-5866. Stephanie Brown Assistant Vice President Training and Marketing Enclosures

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