

MEMO# 5504

January 21, 1994

INDUSTRY PENSION STATISTICS QUESTIONNAIRE

January 21, 1994 TO: INDUSTRY STATISTICS COMMITTEE NO. 2-94 MEMBERS - ONE PER
COMPLEX NO. 5-94 PENSION COMMITTEE NO. 4-94 RESEARCH COMMITTEE NO. 2-94 RE:
Industry Pension Statistics Questionnaire

Attached is a copy of the
Institute's annual Mutual Fund Questionnaire for Pension Statistics which will assist the
Institute in expanding and improving its collection of data concerning retirement plan
investments in mutual funds. Current and accurate information regarding the increasing
role of mutual funds in various retirement savings plans is very important to the industry's
legislative, regulatory, and marketing efforts. Institute members are asked to report the
requested figures on an aggregate basis for all of the funds within the complex. A list of
definitions for requested data is included for your convenience. Please forward the
questionnaire to the appropriate individual within your organization who will be responsible
for its completion. Please contact me at (202) 326-5917 or Anne Schafer at (202) 326-5934
if you or your staff have any questions concerning the questionnaire. Thank you for your
assistance and support for this effort. Kathy Rabon Summers Director of Industry Studies

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