

MEMO# 4592

March 15, 1993

SPEAKING OPPORTUNITIES

March 15, 1993 TO: DIRECT MARKETING COMMITTEE NO. 19-93 PUBLIC INFORMATION COMMITTEE NO. 19-93 SALES FORCE MARKETING COMMITTEE NO. 21-93 RE: SPEAKING OPPORTUNITIES _____ As you know, the Institute operates a Speaker Referral Service that helps consumer groups find mutual fund industry speakers to do generic educational presentations on mutual funds. Most of these speaking engagements are for college classes, consumer groups and fraternal organizations that want very basic information on what mutual funds are and how they work. This memorandum describes three requests for assistance in finding speakers. The local chapter of the American Association of Individual Investors (AAII) in New Hampshire, a group the Institute has helped with several previous speaking dates, is looking for a speaker to address a group of 150 people at their annual symposium. The day-long event will be held on April 24, from 9:00 am until 3:30 pm at New Hampshire College in Manchester, NH. This AAIL group is looking for a speaker on an interesting mutual fund topic of the speaker's choosing. The presentation should be around 45 minutes long. The agenda is somewhat flexible, so the speaker will have a choice of timeslots. If you know of a mutual fund executive who would like to speak before the New Hampshire AAIL Symposium, please call Linda Gelfand at 603/472-2513. An Advanced Securities Analysis class at Hofstra University is looking for a research-oriented speaker to address their MBA- level class. They are looking for a speaker who is able to speak for 45 minutes on How to Evaluate Mutual Fund Performance and/or Innovations in New Fund Product Development on March 22, between 8:30 pm and 10:00 pm. Hofstra University is located in Hemsted, Long Island (New York). The class consists of approximately 35 students. Those interested in speaking before this group should call Professor Sankaran at 516/463-5784. Donald Kemp, who is teaching a course on mutual funds at New York University's School for Continuing Education, is looking for speakers to address his class on a variety of basic mutual fund topics. He has available a total of eight speaking opportunities in June and July of this year. The size of the class is as yet undetermined. If you know of a mutual fund executive who would like to address this class, please contact Donald Kemp at 212/804-2079 (days) or 212/786-9777 (evenings). Though all three of these groups are somewhat flexible in terms of the topics presented, please keep in mind that all remarks must be kept generic and educational in nature. A sales pitch for a particular fund or fund group is not appropriate. Thank you for your help.

Stephanie Brown Marketing Director