

**MEMO# 19048**

July 29, 2005

## **REMINDER: SEPTEMBER 22 SALES FORCE MARKETING COMMITTEE MEETING**

©2005 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. [19048] July 29, 2005 TO: SALES FORCE MARKETING COMMITTEE No. 7-05 RE: REMINDER: SEPTEMBER 22 SALES FORCE MARKETING COMMITTEE MEETING As we previously informed you, the fall 2005 meeting of the Investment Company Institute's Sales Force Marketing Committee has been scheduled for Thursday, September 22, 2005, from 8:30 am to noon at the Institute's offices at 1401 H Street, NW, in Washington, DC. As you will note from the attached agenda, the meeting will feature a number of timely and important topics, including a presentation by Michael Bitterly, Head of MLIM Americas, Global Proprietary Sales, on managing and motivating a sales force, and a panel discussion moderated by Chris Blunt, EVP-Retail Investments, New York Life Investment Management, on the evolution of financial advisors. In addition, the September 22nd meeting will include an informal discussion of current fund-related sales and marketing issues. If you have any issues or questions you would like discussed during this session, please list those items on the attached form or email them to Brenner@ici.org. I will circulate a list of items submitted in advance of the meeting to all meeting registrants—our experience indicates that if topics are circulated in advance, the value of the discussion is considerably enhanced. A block of rooms has been reserved at the Hamilton Crowne Plaza for meeting attendees. The Crowne Plaza, which is located at 14th and K Streets, NW, in Washington, DC, is a very short walk to ICI's offices. To make your hotel reservation, please call the hotel directly at 202/682- 0111 and mention your ICI affiliation in order to receive the \$229.00 room rate. An informal networking dinner for committee members will be held on Wednesday, September 21st (cocktails at 6:30 pm and dinner at 7:00 pm) at the Oval Room, which is located at 800 Connecticut Avenue NW in Washington, DC; Phone: 202 463-8700. Please note that the total cost of the dinner will be divided by the number of participants, and each participant will receive an invoice AFTER the dinner. If you cancel a dinner registration with less than 48- hours notice, you will be charged for your portion of the dinner. And finally, ICI's Research Committee will be meeting at ICI's offices from 10:00 am to 4:00 pm on September 21st— members of the Sales Force Marketing Committee are welcome to attend the Research meeting. 2 To register for the meeting, please complete and return the attached form to the Institute as soon as possible. Business attire will be appropriate for the meeting; business casual attire will be appropriate for the dinner. If you have any questions about the September meeting, please contact me at 202/326-5883 (email: brenner@ici.org). We look forward to seeing you in September. Linda Brenner Director Operations & Continuing Education Attachments (in .pdf format)

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