

MEMO# 13866

August 17, 2001

OCTOBER 18-19, 2001 ROUNDTABLE MEETING

[13866] August 17, 2001 TO: SALES DESK MANAGERS ROUNDTABLE No. 8-01 RE: OCTOBER 18-19, 2001 ROUNDTABLE MEETING Attached is a preliminary agenda for the October 18-19, 2001 meeting of the Investment Company Institute's Sales Desk Managers Roundtable. The two-day meeting will be held at the offices of Franklin Templeton Investments at 100 Fountain Parkway in St. Petersburg, Florida. On Thursday, October 18th, the meeting will run from 1:00 - 5:00 pm and will include a tour of Franklin Templeton's offices. An optional networking dinner will begin at 6:30 pm that evening at the Rusty Pelican at 2425 Rocky Point Drive in Tampa, Florida (telephone: 813/281-1943). Transportation will be provided to and from the restaurant. On Friday, October 19th, the meeting will run from 8:30 am to 1:00 pm at Franklin Templeton's offices and will include a continental breakfast and lunch. A block of rooms has been reserved for meeting attendees at the Homewood Suites--Hilton, which is located at 2233 Ulmerton Road in Clearwater, FL; telephone number: 727/573-1500. The hotel is approximately 15 miles from Tampa International Airport. Transportation to the hotel by taxi is approximately \$30. Directions and information regarding the hotel are available at <http://www.homewood-suites.com>. To make your room reservation, please call the Homewood Suites directly by September 27, 2001 and mention that you will be attending an Institute meeting in order to receive the special rate of \$99.00 per one-bedroom suite. Please also note that the Institute will arrange bus transportation to and from the Homewood Suites and Franklin Templeton for meeting attendees (the hotel is a very brief bus ride to Franklin Templeton's offices). On Friday, October 19th, the bus will take any interested meeting attendees to the airport following the meeting and after stopping by the Homewood Suites. Please return the attached form to the Institute to register for the October 18-19, 2001 Sales Desk Managers Roundtable meeting as soon as possible. If you plan to attend the optional networking dinner at the Rusty Pelican on Thursday, October 19th, please return a check for \$60 with your Institute registration form. Also, if meeting attendees are interested, a golf outing will be organized for Friday afternoon. Please indicate if you are interested on the attached meeting registration form. 2 Please note that business casual attire will be appropriate for the meetings; casual attire for the dinner. If you have any questions about the October meetings or suggestions for discussion topics or speakers, please contact me at 202/326-5883 (email: brenner@ici.org). A meeting agenda will be sent to you shortly. We look forward to seeing you in October. Linda Brenner Director - Operations & Training Attachments Attachment no. 1 (in .pdf format)

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