

MEMO# 6816

April 3, 1995

TASK FORCE ON INSTITUTE'S 1995 401(K) STUDY

April 3, 1995 TO: INDUSTRY STATISTICS COMMITTEE No. 7-95 PENSION COMMITTEE No. 6-95 RESEARCH COMMITTEE No. 14-95 RE: TASK FORCE ON INSTITUTE'S 1995 401(K) STUDY _____ We have scheduled a meeting on Tuesday, April 25, 1995, 10:00 a.m., at the Institute's offices located at 1401 H Street, N.W., for members of the Industry Statistics, Pension and Research Committees interested in serving on a Task Force in connection with the Institute's 1995 401(k) Study. The Institute proposes to collect annual information on the characteristics of 401(k) plans. This information will be obtained through use of a written survey sent to mutual fund companies providing investment management and recordkeeping services to 401(k) plans. The objective is to build a database on 401(k) plans for which mutual fund companies provide recordkeeping and investment management services. This project is part of our ongoing analysis of retirement plan developments of significance to the mutual fund industry. A general description of the study is attached for your information. The role of the Task Force will be to comment and give guidance at critical stages of the study. Lunch will be served following the meeting. Please RSVP on the attached telecopy sheet at (202) 326-5841. Kathy Rabon-Summers Director - Industry Studies John J. Canary, Jr. Assistant Counsel - Pension Attachment INVESTMENT COMPANY INSTITUTE 401 (K) Study Task Force Meeting CONFIRMATION OF ATTENDANCE FORM Please fax this portion to Lisa Rand, Investment Company Institute, (202) 326-5841. Meeting of the 401(k) Study Task Force 10:00 a.m., Tuesday, April 25, 1995 David Silver Conference Room Investment Company Institute 1401 H Street, N.W. 12th Floor Washington, DC 20005 COMMITTEE MEMBER NAME COMPANY NAME G I will be attending the meeting. G I will not be attending the meeting. If you have any questions, please call John Canary at 202-326-5835, or Kathy Rabon-Summers at 202- 326-5917.