

**MEMO# 14893**

July 10, 2002

# **ICI TRANSFER AGENT ADVISORY COMMITTEE 2002 MUTUAL FUND COMPLEX INTERNET WEBSITE SURVEY RESULTS**

[14893] July 10, 2002 TO: OPERATIONS COMMITTEE No. 10-02 TRANSFER AGENT ADVISORY COMMITTEE No. 51-02 RE: ICI TRANSFER AGENT ADVISORY COMMITTEE 2002 MUTUAL FUND COMPLEX INTERNET WEBSITE SURVEY RESULTS Last year, the Transfer Agent Advisory Committee established a task force to update the Mutual Fund Complex Internet Website Survey conducted by the Institute in 1999 that gathered data on website functionality. The task force developed the enclosed survey to gather specific information regarding current trends and developments in mutual fund websites including site features, personalization and customization, e-mail capabilities, electronic document delivery, online transactions, retirement and state tuition planning capabilities, online forms and calculators, investor education, year-end tax information and website security issues. Seventy mutual fund complexes completed the survey on a specially designated area of the Institute's member website. The survey results and a listing of the mutual fund complex participants are attached for your review. The ICI solicited data from member complexes for informational purposes only. All survey responses were aggregated and no individual complex name or data has been distributed or discussed in the final document. Each member should independently review and utilize such aggregated data as it deems appropriate. The aggregate survey results will be reviewed and discussed at future Committee meetings. We would like to extend our thanks to the following Transfer Agent Advisory Committee members who participated on the task force, especially Lori Burgess of Delaware Service Co., who led this project: Lori Burgess - Delaware Service Co. - Chair Susan Cornwell - OppenheimerFunds Services Mary Corcoran - AIM Fund Services Rob Dineen - Morgan Stanley Dean Witter Trust Joan Dowd - BFDS Tom Gerrits - Strong Capital Management David Harbeitner - T. Rowe Price Associates Kyle Keelan - IDEX Mutual Funds Teri Luensmann - USAA Investment Management Blaine Newby - Janus Capital Corporation 2 Charlie Ragusa - CDC IXIS Asset Management Services Marc Scher - Merrill Lynch Bob Smith - Franklin Templeton Cheryl Sobolewski - John Hancock We would like to thank those fund complexes that participated in the survey. If you have any questions or comments regarding the survey, please contact the undersigned at 202- 326-5930 or by email at [kjoaquin@ici.org](mailto:kjoaquin@ici.org). Kathleen C. Joaquin Director - Transfer Agency & International Operations Attachments Attachment no. 1 (in .pdf format)

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