

MEMO# 4457

January 27, 1993

SPEAKING OPPORTUNITY IN HOUSTON

January 27, 1993 TO: DIRECT MARKETING COMMITTEE NO. 5-93 PUBLIC INFORMATION COMMITTEE NO. 3-93 SALES FORCE MARKETING COMMITTEE NO. 5-93 RE: SPEAKING OPPORTUNITY IN HOUSTON _____

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 consumer groups and fraternal organizations that require very basic information on what mutual funds are and how they work. More and more, the Institute is being asked to help identify speakers for local chapters of the American Association of Individual Investors (AII). These groups tend to meet monthly, and, as a result, have an ongoing need for speakers to address their groups. At the same time, members of many AII local chapters are active fund investors who need presentations that cover more advanced topics than the basics of what mutual funds are and how they work. The AII local chapter in Houston, a group the Institute has helped with a number of speaking dates, is looking for speakers on mutual fund topics to address their group. They are particularly interested in finding a speaker for their March 16 and April 20 meetings. The meetings will be held at 7:00 pm at the Kendall Library in Houston. Approximately 60 people are expected to attend. If you know of a mutual fund executive who would like to speak before the Houston AII, please call their program director, Burt Brumby, at 713/939-1363. Please keep in mind that, though the group is flexible regarding the topic presented, all remarks must be kept generic and educational in nature. A sales pitch for a particular fund or fund group is not appropriate. If you would like to speak before other AII groups that may be in search of speakers, please call me at 202/955-3536. Thank you for your help. Stephanie Brown Marketing Director