

**MEMO# 8332**

October 17, 1996

## **SPEAKER HANDOUTS: SEPTEMBER 26, 1996 MEETING**

October 17, 1996 TO: SALES FORCE MARKETING COMMITTEE No. 35-96 RE: SPEAKER HANDOUTS: SEPTEMBER 26, 1996 MEETING

\_\_\_\_\_ At the September 26, 1996 meeting of the Institutes Sales Force Marketing Committee, Neil Bathon, President of Financial Research Corp., made a presentation entitled "The Evolution of Mutual Fund Distribution." Attached for your information are copies of the slides that were shown by Mr. Bathon. For those of you who were unable to attend the Committee meeting, I have also attached a copy of the one- page handout distributed by our other speaker, John Rekenthaler of Morningstar. Also at the September meeting, Committee Chairman Mark Freeman reported that a task force consisting of members of the Institutes Industry Statistics and Research Committees has been formed to review the categories frequently used by the Institute--direct marketed and sales force marketed--for data reporting purposes. If you would like to provide input as to the types of data categories that would be most valuable to your firm, please call me at 202/326-5883 (electronic mail: brenner@ici.com). Please also contact me if you have any suggestions for agenda items for future Committee meetings. We look forward to seeing you at the Joint Winter Committee Meetings in Scottsdale, Arizona. Linda Brenner Director, Sales Force Marketing and Financial Planning Services Enclosures

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