

**MEMO# 3900**

July 1, 1992

## **SPEAKING OPPORTUNITIES AVAILABLE**

July 1, 1992 TO: DIRECT MARKETING COMMITTEE NO. 20-92 PUBLIC INFORMATION  
COMMITTEE NO. 23-92 SALES FORCE MARKETING COMMITTEE NO. 20-92 SMALL FUNDS  
COMMITTEE NO. 6-92 RE: SPEAKING OPPORTUNITIES AVAILABLE

As you know, the Institute, through its Speaker Referral Service, helps consumer groups find fund industry executives to do generic educational presentations before their groups. Typically, these presentations cover the basics of mutual fund investing, such as what mutual funds are, the types and benefits of funds, the cost of becoming a fund shareholder, and how to track a fund investment. Requests for speakers are handled on a case-by-case basis, with speakers identified from a list of volunteers. Though most of the speaking dates arranged by the Institute's Speaker Referral Service involve consumer groups seeking very basic presentations, we have also arranged speaking dates before groups of more experienced investors. In fact, we have helped many local chapters of the American Association of Individual Investors (AAII) find speakers on more advanced topics, such as evaluating the risks of investing in international funds, and the tax implications of fund investing. In three cases, we have helped local AAIL chapters so often that they have come to rely on us to help them plan many, if not most, of their upcoming meetings. These AAIL chapters have an ongoing need for speakers and ideas for presentations. It seems to make sense, therefore, for fund groups interested in having speakers make presentations before the groups to call them directly. Attached is a letter from Al Golly, who handles programming for the local chapters of the AAIL in New York City and Long Island. His letter describes the dates for which the two chapters are seeking speakers. If you are interested in speaking before either of the two groups, please call Al Golly at 212/541-3955. The AAIL chapter in Houston is also in the position of frequently seeking speakers on mutual fund investing topics. They are currently interested in finding a speaker on municipal bond funds to address their July 21 meeting. The meeting will be held at 7:00 pm at the Kendall Library in Houston. Approximately 50 people typically attend the meetings. If you are interested in providing a speaker for the meeting, please call Burt Brumby at 713/939-1363. Speakers are asked to keep their remarks generic and educational in nature. The presentations should not be sales pitches for individual funds or fund groups. No speaking fee should be solicited or accepted for the presentations. Thank you for your help. Please call me at 202/955-3536 if you have any question or comments. Also, I'd appreciate hearing from you if you speak before any of these groups. Stephanie Brown Marketing Director Attachment