

MEMO# 16014

May 5, 2003

MINUTES: FEBRUARY 27, 2003 MEETING AND 2003 GMM

[16014] May 5, 2003 TO: SALES FORCE MARKETING COMMITTEE No. 6-03 RE: MINUTES: FEBRUARY 27, 2003 MEETING AND 2003 GMM Attached are minutes from the February 27, 2003 meeting of the Investment Company Institute's Sales Force Marketing Committee. The next committee meeting has been scheduled for Wednesday, October 1, 2003 at the ICI's offices in Washington, DC. More information about this meeting will be sent to you as the meeting date approaches. Also, as a reminder, the ICI's 2003 General Membership Meeting (GMM) will be held May 21-23, 2003 at the Washington Hilton in Washington, DC. Two sessions that may be of particular interest to members of the Sales Force Marketing Committee are: • "Making the Hard Choices: Where to Invest and How to Win in a Multi-Product, Multi-Channel World" by Steve DeLano, President, Market Metrics • A panel session, "Strategies for Meeting Changing Investor Needs," featuring John W. Bachmann, Managing Principal, Edward Jones; James P. Gorman, President, Global Private Client Group, Merrill Lynch; and Todd Robinson, Chairman, LPL Financial Services More information about the 2003 GMM, including a program and registration information, is available at <http://conferences.ici.org/gmm03.html>. If you have any questions about the attached minutes or upcoming meetings, please contact me at 202/326-5883; email: brenner@ici.org. Linda Brenner Director - Operations & Continuing Education Attachment (in .pdf format)