

**MEMO# 11873**

May 10, 2000

## **AGENDA AND SURVEY: JUNE 28, 2000 MEETING**

[11873] May 10, 2000 TO: SALES FORCE MARKETING COMMITTEE No. 10-00 RE: AGENDA  
AND SURVEY: JUNE 28, 2000 MEETING

\_\_\_\_ Attached is a preliminary agenda for the June 28, 2000 meeting of the Investment Company Institute's Sales Force Marketing Committee. The meeting will be held at the Institute offices at 1401 H Street, NW in Washington, DC. As you will note from the agenda. Dan Kreuter, President of DAK Associates, will be discussing mutual fund wholesaler and National Sales Manager compensation at the meeting. To enhance the value of his presentation, we would like you to take a few minutes to complete the attached brief compensation survey and return it to my attention. Only one survey should be completed per mutual fund organization. Please note that all survey responses will be compiled by the Institute and will remain confidential. No individual respondent's name or data will be distributed or shared with any organization. Mr. Kreuter and survey participants will receive only a copy of the compiled results. In order to have the survey results available for the June 28th meeting, we will need to receive your responses by Wednesday, June 14th. Also, as we previously informed you, an optional networking dinner for members of the Sales Force Marketing Committee and the Direct Marketing Committee will be held on Tuesday, June 27th (restaurant TBD). The dinner speaker will be Brian Reid, a Senior Economist with the Institute's Research Department. Mr. Reid will discuss mutual fund assets and flows and gathering assets in a maturing market. The dinner will begin with cocktails at 6:30 pm. A block of rooms has been reserved at the Crowne Plaza Washington (14th and K Streets, NW; Phone: 202/682-0111) for meeting attendees. To obtain the special room rate of \$165 per night at the Crowne Plaza, please make your reservation by May 26, 2000 (mention that you will be attending an Institute meeting when making your reservation). Also, please return the attached registration form to the Institute. If you plan to attend the optional networking dinner on Tuesday, June 27th, please return a check for \$65 with your Institute registration form. We look forward to seeing you at the June 28th Committee meeting. If you have any questions about this survey or the meeting, please contact me at 202/326-5883; email: brenner@ici.org. Linda Brenner Director, Operations and Training Enclosures Sales Force Marketing Committee Direct Marketing Committee Investment Company Institute June 28, 2000 \_\_\_\_ I will attend the Sales Force Marketing Committee meeting on June 28, 2000. \_\_\_\_ I will attend the Direct Marketing Committee meeting on June 28, 2000. \_\_\_\_ I will attend the optional dinner at 6:30 pm on Tuesday, June 27, 2000 and have enclosed a check for \$65.00 made out to the Investment Company Institute.

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Phone: \_\_\_\_\_ E-Mail \_\_\_\_\_

Address:\_\_\_\_\_ I would like to have the following topics discussed at the meetings:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_ I would like to make a presentation/lead a discussion on the following topic:

Topic:\_\_\_\_\_ Please return this form to: Tamara Braggs Investment Company Institute 1401 H Street, NW Washington, DC 20005 202/326-5866 (phone) 202/326-5853 (fax) \_\_\_\_ Please check here if you need special services due to a disability.

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