

MEMO# 15422

December 6, 2002

MEETING MINUTES; NOTICE OF FEBRUARY 2003 MEETING

[15422] December 6, 2002 TO: SALES FORCE MARKETING COMMITTEE No. 24-02 RE: MEETING MINUTES; NOTICE OF FEBRUARY 2003 MEETING Attached are the minutes from the September 26, 2002 meeting of the Investment Company Institute's Sales Force Marketing Committee. As a reminder, the next meeting of the Sales Force Marketing Committee has been scheduled for Thursday, February 27th from 9:00 am to 12:15 pm at the Institute offices in Washington, DC. A block of hotel rooms has been reserved at the JW Marriott Hotel, which is located at 1331 Pennsylvania Ave, NW, for meeting attendees. To make your hotel reservations, please call the Marriott at 1-800-228-9290 and mention the Institute in order to receive the discounted room rate of \$199/night plus tax. The JW Marriott is a brief walk to the Institute offices. The following preliminary agenda suggestions were made at the September Committee meeting: • An in-depth look at mutual fund redemptions by Brian Reid (ICI senior economist) • Doing more with less/ideas for increasing productivity • Sales force structures—specialists/generalists • Factor-weighted compensation for the sales force • How to manage the sales force? • Wholesaler training—how much is being done in-house? • Are reps leaving the mutual fund business? What can we do to get them back? • How to prepare for a sideways market? • Investor behavior • Mutual fund alternatives—hedge funds Please review this list of suggestions and contact me with any additional topics you would like to have addressed at the February 2003 meeting and your comments about the above ideas. My telephone number is 202/326-5883; email: Brenner@ici.org. Thank you very much and I look forward to seeing you at the February 2003 meeting. Linda Brenner Director - Operations & Continuing Education Attachment (in .pdf format)