

MEMO# 34042

February 18, 2022

Registration Now Open: April 7-8, 2022 Hybrid Internal Sales Managers Roundtable Meeting

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TO: Internal Sales Managers Roundtable RE: Registration Now Open: April 7-8, 2022 Hybrid Internal Sales Managers Roundtable Meeting

The Investment Company Institute's Internal Sales Managers Roundtable will meet on Thursday, April 7, and Friday April 8, 2022, at ICI's offices on the 12th floor of 1401 H Street, NW, in Washington, DC. We will offer both an in-person attendance option and the ability to attend via Zoom. To comply with social distancing requirements, we may split in-person attendees among two conference rooms and may need to limit in-person attendance overall.

A preliminary meeting agenda is attached.

Covid-19 Protocols

Please note that you must be fully vaccinated and must attest to being fully vaccinated as well as show proof of vaccination in order to attend the meeting in person. ICI's Visitor Covid-19 Protocols are attached—please read this file in its entirety before registering.

Building Security

ICI's building security procedures require that all meeting attendees check in at the first-floor security desk upon arrival. An ICI staff member will be in the building lobby to provide members with access to the elevators.

Meeting Registration and Logistics

Committee members should register for the Internal Sales Manager Roundtable meeting and the April 7 networking dinner here: <https://cvent.me/17qKZb>. When registering, please provide any topics you would like addressed at this or future meetings.

On Thursday, April 7, light refreshments will be provided for in-person attendees. On Friday, April 8, a continental breakfast will be available beginning at 8:00 am for in-person attendees. Boxed lunches will be provided near the end of the meeting. Attendees are welcome to network and enjoy lunch as part of the meeting or they can take a boxed lunch

with them at the conclusion of the meeting.

Hotel

A block of rooms has been reserved at the Sofitel in Washington, DC, for meeting attendees. Sofitel, which is located at 806 15th St NW, Washington, DC 20005, in Washington, DC, is a one-block walk to ICI's offices. To make your hotel reservation, please call the hotel directly at 202-730-8800 and mention "ICI April 2022" prior to March 17, 2022. (Note: The hotel block may fill prior to this date.) Please mention your Investment Company Institute affiliation in order to receive the \$299 plus tax room rate.

Networking Dinner

An optional networking dinner for in-person meeting attendees will be held on Wednesday evening, April 7, at 6:30 pm at a restaurant TBA. The dinner will begin at 6:30 pm with a brief wine/beer reception. We will sit for dinner at approximately 7:15 pm. The cost to attend the dinner is \$120. Please note that if you cancel a dinner registration with less than three business days' notice, the \$120 will NOT be refunded.

Miscellaneous

Business casual attire will be appropriate for both the in-person committee meeting and dinner. If you have any logistical questions about the April 7-8 meeting or the associated dinner, please contact Dom Liberatore at 202-326-5970 or dom.liberatore@ici.org. Please contact Linda Brenner with suggestions for the meeting agenda.

We look forward to seeing you (in-person or via Zoom) in April 2022!

Linda Brenner

Senior Director, Industry Operations and Diversity & Inclusion

Marshall McIntosh

Chair - Internal Sales Managers Roundtable