

MEMO# 34949

February 13, 2023

Registration Open: Internal Sales and Managers Roundtable Meeting - March 2023

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TO: Internal Sales Managers Roundtable RE: Registration Open: Internal Sales and Managers Roundtable Meeting - March 2023

The Investment Company Institute's Internal Sales Managers Roundtable will meet on Thursday, March 30, and Friday, March 31, 2023, at First Eagle Investments at 1345 Avenues of the Americas in New York, NY. On Thursday, March 30, the meeting will run from 1:30–5:00 p.m. (ET). On Friday, March 31, the meeting will run from 8:30 a.m.–Noon (ET). We will offer both an in-person attendance option and the ability to attend via Zoom.

Roundtable members should register for the meeting and the optional networking reception using this link: <https://cvent.me/aLa8wP>. When registering, please provide any topics you would like addressed at this or future meetings.

COVID-19 Protocols

Pursuant to ICI's current COVID-19 policies attendees agree to confidentially notify ICI of any COVID-19 infection within 5 days of attending the meeting. Vaccination against COVID-19 is no longer mandatory as of December 16, 2022.

We will follow the prevailing policies of our host regarding masking and other guidelines. Attendees who prefer to wear a mask, if not otherwise required, are welcome and encouraged to do so.

We will continually monitor the situation and will notify committee members and attendees if the health situation warrants a change to in-person participation or other arrangements.

Meeting Registration and Logistics

Roundtable members should register for the meeting and the optional networking reception here: <https://cvent.me/aLa8wP>. When registering, please provide any topics you would like addressed at this or future meetings.

Upon arrival at First Eagle's office, meeting registrants will be required to present a

government-issued photo ID. On Thursday, March 30, light refreshments will be provided for in-person attendees. On Friday, March 31, a continental breakfast will be available beginning at 8:00 a.m. 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

As a committee we are trying something new regarding hotel, no hotel block. There are three hotels within a few blocks of the meeting at three different price points. These are:

[Hilton New York Midtown](#)

[Conrad New York Midtown](#)

[Warwick Hotel NYC](#)

Networking Reception

An optional networking reception for in-person attendees will be held on Thursday evening, March 30, at 6:30 p.m. location is TBD, details will be emailed the committee once arrangements are final. The reception will begin at 6:30 p.m. The cost to attend the reception is \$140. Please note that if you cancel a registration with less than three business days' notice, the \$140 will NOT be refunded.

Miscellaneous

Business casual attire will be appropriate for both the in-person committee meeting and reception. If you have any logistical questions about the March 30 & 31 meeting or the associated reception, please contact Magen Rauch at magen.rauch@ici.org. Please contact John Randall with suggestions for the meeting agenda.

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

Mark Totten

Chair - Internal Sales Managers Roundtable Committee

John Randall

Director, Operations and Distribution