

## NEWS RELEASE

April 1, 2003

# Mutual Fund Industry Sets Annual Meeting, April 2003

### Mutual Fund Industry Sets Annual Meeting

Washington, DC, April 1, 2003 - The Investment Company Institute's General Membership Meeting (GMM), the nation's largest annual gathering of mutual fund industry leaders, will take place May 21 through May 23 in Washington, DC at the Hilton Washington.

The theme of this year's meeting, "[Helping Investors Meet Today's Challenges](#)," will be explored in presentations, seminars, and panel discussions by industry leaders, business executives, and government leaders.

A members-only session on Wednesday, May 21—limited to investment company members of the Institute—will examine the many influences that have helped shape the current market environment, and discuss approaches for investment managers to guide investors amid changing investment markets. The speakers are Charles J. Hess, President, and Gail A. Eisenkraft, Managing Partner, of Inferential Focus.

The sessions on Thursday, May 22, open with remarks by Robert H. Gordon, 2003 General Membership Meeting Chairman and President and CEO of Banc of America Capital Management; Paul G. Haaga, Jr., Institute Chairman and Executive Vice President of Capital Research and Management; and Institute President Matthew P. Fink.

The general session on Thursday morning offers an executive forum, featuring James F. Rothenberg, President of Capital Research and Management; William S. Thompson, Jr., Managing Director and CEO of Pacific Investment Management; and Robert L. Reynolds, Vice Chairman and COO of Fidelity Investments. The three executives will discuss the current environment for the mutual fund industry, and offer their perspectives on the industry's future. The panel will be moderated by CNBC anchor Tyler Mathisen.

Thursday's luncheon program highlights current political and legislative issues with seasoned journalist David Gergen, Editor-at-Large of U.S. News & World Report, Mara Liasson, National Political Correspondent for National Public Radio, and Kate O'Beirne, Washington Editor of National Review.

Thursday afternoon's general program will feature a presentation by 2002 Nobel Laureate winner and Princeton economist Daniel Kahneman, PhD, on psychology, risk, and investment. Thursday's program will close with two concurrent tracks. The first will feature sessions concentrating on assessing the retirement market, and the second will offer sessions focusing on meeting the needs of investors and advisers in today's markets.

The Institute will host a special reception and dinner Thursday night at historic Union Station with entertainment provided by The Capitol Steps.

The general session on Friday, May 23 opens with a report from the Securities and Exchange Commission. This year's annual meeting will close with a discussion on the current state of financial markets and strategies for meeting the changing needs of investors. The discussion will feature a panel of Wall Street experts moderated by James S. Riepe, Vice Chairman of T. Rowe Price Associates. Panelists include John W. Bachmann, Managing Principal at Edward Jones; James P. Gorman, President of Global Private Client Group at Merrill Lynch; and Todd Robinson, Chairman of LPL Financial Services.

Registration is \$525 for Institute members and \$975 for nonmembers. Additional meeting details, the conference program, and general registration information are available on the Institute's conference website.

Working members of the news media wishing to cover the General Membership Meeting are required to complete a press registration form in order to obtain press credentials. Press registration information is available by contacting James Doyle at [jdoyle@ici.org](mailto:jdoyle@ici.org). Only accredited members of news media organizations and qualified freelance writers are eligible for press credentials. For hotel room reservations at the convention site, contact the Hilton Washington directly at 202/483-3000.

---

Copyright © by the Investment Company Institute. All rights reserved. Information may be abridged and therefore incomplete. Communications from the Institute do not constitute, and should not be considered a substitute for, legal advice.