

## NEWS RELEASE

April 1, 2004

# Nation's Largest Annual Meeting of Mutual Fund Leaders Scheduled for May 2004 in Washington, DC, April 2004

Nation's Largest Annual Meeting of Mutual Fund Leaders Scheduled for May 2004 in Washington, DC

Washington, DC, April 1, 2004 - The Investment Company Institute's [General Membership Meeting](#) (GMM), the nation's largest annual gathering of mutual fund leaders, will take place May 18 through May 20 in Washington, DC at the Hilton Washington.

The conference theme is "Mutual Funds: A Matter of Trust." Among the conference highlights will be a discussion of the recent mutual fund scandals by fund company leaders. They are expected to address the evolving concerns and needs of fund shareholders in the wake of the scandals and the impact of initiatives to maintain investor trust and confidence. The discussion is scheduled for Wednesday morning, May 19. Participants will include:

- John J. Brennan, Chairman and CEO of The Vanguard Group
- Robert S. Dow, Managing Partner at Lord, Abbett & Company
- Dawn-Marie Driscoll, Independent Director of Scudder Funds.
- Jason Zweig, Columnist, Money Magazine (panel moderator)

Other major elements of the GMM are described below.

## Tuesday, May 18, Opening Session

Ken Dychtwald, President and CEO of Age Wave, will examine how demographic changes and a maturing marketplace impact consumer behavior and investment trends.

## Wednesday, May 19, Executive Forum

A special morning session will include remarks by ICI Chairman Paul Haaga and a conversation with retiring ICI President Matthew Fink. Fink, who announced his retirement last year, has worked at the Institute for 33 years.

## Wednesday, May 19, Keynote Session

Jeff Immelt, Chairman and CEO of GE, will offer his perspective on the importance of corporate governance and upholding high ethical standards in today's business

environment.

## **Wednesday, May 19, Luncheon Program**

Former Assistant Defense Secretary for Public Affairs Torie Clark, who served in the Bush Administration until recently, and Dee Dee Myers, former White House Press Secretary during the Clinton Administration, will examine the current political atmosphere and discuss the 2004 elections.

## **Wednesday, May 19, General Session**

An afternoon presentation by Fred Reichheld, Director Emeritus at Bain & Company, will focus on earning, building and maintain investor loyalty.

## **Thursday, May 20, General Session**

In the morning, attendees will hear a report from the Securities and Exchange Commission. Lt. General Harold Moore (US Army Ret.), author of *We Were Soldiers Once ... And Young*, will close the conference with a presentation about the importance of leadership in challenging times.

## **Information About Attendance**

Registration is \$625 for Institute members and \$1,125 for nonmembers. Additional meeting details, a conference program, and general registration information are available on the Institute's conference website.

## **Special Information for Journalists**

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.