

NEWS RELEASE

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Mutual Fund Industry Annual Meeting Set for May 22-24, March 2002

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Washington, DC, March 20, 2002 - The Investment Company Institute's General Membership Meeting (GMM), the nation's largest annual gathering of mutual fund industry leaders, will take place May 22 through May 24 in Washington, DC at the Hilton Washington.

The theme of this year's meeting is "[Continuing a Tradition of Integrity in Challenging Times](#)." The gathering offers presentations, seminars, and panel discussions by industry leaders, business executives, and government leaders.

The opening general session on the afternoon of Wednesday, May 22, examines current consumer behavior patterns and how current consumer trends impact financial services companies. The scheduled speaker is J. Walker Smith, Ph.D., Managing Partner at Yankelovich Partners, a leading research and consulting services firm. Industry executives Robert H. Gordon, President of Banc of America Advisors, and F. William McNabb, Managing Director-Institutional Investor Group of The Vanguard Group, will respond to Mr. Smith's comments.

The Thursday, May 23, morning session opens with remarks by John D. Carifa, 2002 General Membership Meeting Chairman and President and COO of Alliance Capital Management; Terry K. Glenn, Institute Chairman and Chairman Americas and President of Merrill Lynch Funds, Merrill Lynch Investment Managers; and Institute President Matthew P. Fink.

During the keynote session on Thursday morning, Joseph J. Grano, Chairman and CEO of UBS PaineWebber, will offer his perspectives on the current state of the financial services industry and provide a short-term outlook on the industry.

Thursday's luncheon features distinguished author and prominent historian David McCullough. Mr. McCullough's presentation will examine the life of John Adams.

Thursday afternoon's general session will address trends and issues within the retirement market, including the role of personal retirement savings and what Americans will need to do to secure their future. The featured speaker will be John B. Shoven, Charles R. Schwab Professor of Economics at Stanford University. Thursday's program will close with two concurrent sessions focusing on asset accumulation in today's environment and advising investors on retirement needs.

The session on Friday, May 24, opens with the GMM breakfast featuring a report from the Securities and Exchange Commission. The annual meeting will close with a discussion on the current state of financial markets and challenges confronting the markets. The discussion will feature a panel of Wall Street experts moderated by Robert Litan, Vice President and Director of Economic Studies at the Brookings Institution.

Registration is \$525 for Institute members and \$975 for nonmembers. Additional meeting and registration information is available by calling the Institute Conference Division at 202/326-5968.

NOTE: 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. Registration information is available from ICI's Public Information Department by contacting John Collins at (202) 326-5864 or collins@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.

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