

NEWS RELEASE

April 25, 2001

Additional Speakers Announced for Mutual Fund Industry Annual Meeting, April 2001

Additional Speakers Announced for Mutual Fund Industry Annual Meeting
Washington, DC, April 25, 2001 - The Investment Company Institute's General Membership Meeting, the nation's largest annual gathering of mutual fund industry leaders, will take place May 16 through May 18 at the Hilton Washington Hotel and Towers in Washington, DC.

The theme of this year's meeting is "[Continuing a Tradition of Integrity: Navigating the Changing Landscape](#)." The meeting features presentations, seminars, and panel discussions by industry leaders, business executives, and government leaders.

The General Membership Meeting opens on the afternoon of Wednesday, May 16 with a presentation examining strategies for financial services companies operating in today's global economy with speaker Lowell L. Bryan, Director of McKinsey and Company, a leading international management consulting firm.

The morning session on Thursday, May 17 opens with remarks by Mitchell M. Merin, 2001 General Membership Meeting Chairman and President and COO of Morgan Stanley Dean Witter Asset Management; Terry K. Glenn, Institute Chairman and Chairman Americas and President of Merrill Lynch Investment Managers; and Institute President Matthew P. Fink.

During the keynote session on Thursday morning, Charles R. Schwab, Chairman and Co-CEO of the Charles Schwab Company, and Philip J. Purcell, Chairman and CEO of Morgan Stanley Dean Witter and Company, offer their perspectives on new technology, the global economy, and the outlook for the next three to five years. The session will be moderated by Robert Litan, Director of Economic Studies at the Brookings Institution.

Thursday's luncheon features a progress report from National Urban League Executive Vice President and Chief Operating Officer Milton Little and ICI Executive Vice President Julie Domenick on Investing for Success, "a partnership designed to address an "investment knowledge gap" between African Americans and the U.S. population at large. The luncheon also features author Caroline Alexander, who will discuss explorer Ernest Shackleton's struggle for survival on the ice-bound Antarctic Sea.

The Thursday afternoon general session features a panel of financial services analysts discussing strategies for asset management firms and the future of the mutual fund

industry. The panel includes Michael L. Goldstein, Chief Investment Strategist, Sanford C. Bernstein & Company; Henry McVey, Vice President of Asset Management and Brokerage, Morgan Stanley Dean Witter; and Joan S. Solotar, Managing Director, Credit Suisse First Boston.

Thursday afternoon also will feature concurrent sessions discussing opportunities and challenges facing mutual funds, such as assessing privacy regulations, the marketing of funds in Europe, and the value of product marketing and branding.

Friday, May 18 opens with the presentation of the 14th Annual Journalism Awards for Excellence in Personal Finance Reporting in 2000, sponsored by American University School of Communication and the ICI Education Foundation.

Paul F. Roye, Director, Division of Investment Management at the U.S. Securities and Exchange Commission, is scheduled to speak during Friday morning's general session. Following Roye's address, former House Speaker Newt Gingrich and political commentator James Carville will explore the changing political landscape in Washington.

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.