

## NEWS RELEASE

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# Mutual Fund Industry Annual Meeting Set for May 16-18, March 2001

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Washington, DC, March 12, 2001 - The Investment Company Institute's General Membership Meeting (GMM), the nation's largest annual gathering of mutual fund industry leaders, will take place May 16-18 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 gathering features presentations, seminars, and panel discussions by industry leaders, business executives, and government leaders.

The opening general session on the afternoon of Wednesday, May 16, examines 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 Thursday, May 17 morning session 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, a leading public policy research organization.

Thursday's luncheon features a progress report on "Investing for Success," a partnership between the National Urban League and the ICI Education Foundation. The luncheon also features noted author Caroline Alexander, who will recount the saga of polar explorer Ernest Shackleton's struggle for survival for over a year on the ice-bound Antarctic Sea.

Friday, May 18, opens with the GMM breakfast and 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. The breakfast also features a speaker from the Securities and Exchange Commission. The GMM will close with a discussion between former House Speaker Newt Gingrich and political

commentator James Carville, who will explore the changing political landscape.

Registration is \$525 for Institute members and \$950 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 conference registration form in order to obtain press credentials. Only accredited members of news media organizations and qualified freelance writers are eligible for press credentials. For room reservations at the convention site, contact the [Hilton Washington Hotel and Towers](#) directly at (202) 483-3000.

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