VIDEO

May 2, 2014

Focus on Funds: Preview of ICI's General Membership Meeting

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The May 2, 2014, edition of *Focus on Funds* features ICI General Membership Meeting Chair Marie Chandoha, who discusses how this year's GMM program will address important issues to the fund industry.

Transcript

Stephanie Ortbals-Tibbs, Director, ICI Media Relations: Welcome to *Focus on Funds*, the Investment Company Institute's weekly roundup of industry news, ICI activities, and research findings. This week we're reporting from San Francisco, where I've just finished talking with ICI General Membership Meeting chair Marie Chandoha in her offices at Charles Schwab. She related to me this year's focus on the investor in the meeting programming, and what that means for those who will attend.

Marie Chandoha, President and CEO, Charles Schwab Investment Management: This year our theme is serving investors in an evolving world, and certainly what we do day in and day out in asset management is serve our investors. But we'll cover a range of different topics, including trends in investing, the globalization of asset management, the impact of technology on our business, and—of course— a lot on regulatory trends.

Stephanie Ortbals-Tibbs: Tell me about investing insights.

Marie Chandoha: This year on the investing insights panel we're going to be talking about trends in investing: indexing, trends in active management, and also alternatives. We'll hear about what investors are looking for and also how that's shaping the asset management industry.

Stephanie Ortbals-Tibbs: And then the following day you pick up on it in the distribution panel.

Marie Chandoha: Sure, the distribution panel is going to be talking about some of the trends they're seeing in terms of solutions-based investing for clients. Also, they'll be talking about the need for education to help investors make the right choices for their portfolios.

Stephanie Ortbals-Tibbs: Next week, I’ll talk further with Chandoha about the meeting programming, including a focus on geopolitical events and on good corporate governance. That’s this week in funds. See you next week.

Additional Resources

ICI General Membership Meeting