

VIDEO

May 7, 2010

2010 General Membership Meeting Highlights (video)

VIDEO HIGHLIGHTS

2010 General Membership Meeting
May 5-7, 2010
Washington, DC

Investors and Investing: The Way Forward

At ICI's 52nd Annual General Membership Meeting (GMM) held May 5-7 in Washington, DC, the industry explored issues of critical importance. Video from selected sessions is included below. See all the highlights from the event at the [GMM website](#).

Wednesday, May 5

Welcome and Opening Remarks

- **Mark Fetting**

*Chairman, General Membership Meeting Planning Committee
Chairman and CEO, Legg Mason, Inc.*

```
var so = new SWFObject('http://www.ici.org/deployedfiles/ICI/Site  
Properties/js/player.swf','mpl','360','264','9'); so.addParam('allowfullscreen','false');  
so.addParam('allowsriptaccess','always'); so.addParam('wmode','opaque');  
so.addVariable('file','http://www.ici.org/deployedfiles/ICI/Site  
Properties/video/10_gmm_welcome_remarks.flv'); so.addVariable('lightcolor','000066');  
so.addVariable('screencolor','000066'); so.addVariable('dock','false');  
so.addVariable('stretching','none'); so.write('mediaspace1');
```

President's Address

- **Paul Schott Stevens**

President and CEO, Investment Company Institute

```
var so = new SWFObject('http://www.ici.org/deployedfiles/ICI/Site
```

```
Properties/js/player.swf','mpl','360','264','9'); so.addParam('allowfullscreen','false');  
so.addParam('allowscriptaccess','always'); so.addParam('wmode','opaque');  
so.addVariable('file','http://www.ici.org/deployedfiles/ICI/Site  
Properties/video/10_gmm_presidents_address.flv'); so.addVariable('lightcolor','000066');  
so.addVariable('screencolor','000066'); so.addVariable('dock','false');  
so.addVariable('stretching','none'); so.write('mediaspace2');
```

Thursday, May 6

Leadership Panel: The Way Forward

- **F. William McNabb**, Moderator
Chairman, President, and CEO, Vanguard
- **Greg Johnson**
President and CEO, Franklin Resources, Inc.
- **Bridget A. Macaskill**
President and CEO, First Eagle Investment Management
- **John Walters**
President and COO, Hartford Life

```
var so = new SWFObject('http://www.ici.org/deployedfiles/ICI/Site  
Properties/js/player.swf','mpl','360','264','9'); so.addParam('allowfullscreen','false');  
so.addParam('allowscriptaccess','always'); so.addParam('wmode','opaque');  
so.addVariable('file','http://www.ici.org/deployedfiles/ICI/Site  
Properties/video/10_gmm_leadership_panel.flv'); so.addVariable('lightcolor','000066');  
so.addVariable('screencolor','000066'); so.addVariable('dock','false');  
so.addVariable('stretching','none'); so.write('mediaspace3');
```

Market Insights in the Current World Economy

- **William F. “Ted” Truscott**, Moderator
President, U.S. Asset Management and CIO, Ameriprise Financial
- **Daniel J. Fuss, CFA, CIC**
Vice Chairman, Loomis, Sayles & Company
- **Samantha Ho**
Investment Director, Invesco Hong Kong Ltd.
- **Brian C. Rogers**
Chairman of the Board and CIO, T. Rowe Price Group
- [Powerpoint](#)

```
var so = new SWFObject('http://www.ici.org/deployedfiles/ICI/Site  
Properties/js/player.swf','mpl','360','264','9'); so.addParam('allowfullscreen','false');  
so.addParam('allowscriptaccess','always'); so.addParam('wmode','opaque');  
so.addVariable('file','http://www.ici.org/deployedfiles/ICI/Site  
Properties/video/10_gmm_market_insights.flv'); so.addVariable('lightcolor','000066');  
so.addVariable('screencolor','000066'); so.addVariable('dock','false');  
so.addVariable('stretching','none'); so.write('mediaspace4');
```

Distribution Changes and Challenges

- **Guy Moszkowski**, Moderator
Managing Director, US Equity Research & Head of US Financial Services Research,

Bank of America Merrill Lynch

- **Mark Casady**

Chairman and CEO, LPL Financial

- **Peter Cieszko**

President, Fidelity Investments Institutional Services Company

- **Andy Saperstein**

Managing Director and Head of Wealth Management, Morgan Stanley Smith Barney

- **Dan Timm**

General Partner, Edward Jones

```
var so = new SWFObject('http://www.ici.org/deployedfiles/ICI/Site
Properties/js/player.swf','mpl','360','264','9'); so.addParam('allowfullscreen','false');
so.addParam('allowscriptaccess','always'); so.addParam('wmode','opaque');
so.addVariable('file','http://www.ici.org/deployedfiles/ICI/Site
Properties/video/10_gmm_distribution_changes.flv'); so.addVariable('lightcolor','000066');
so.addVariable('screencolor','000066'); so.addVariable('dock','false');
so.addVariable('stretching','none'); so.write('mediaspace5');
```

Friday, May 7

A Regulatory Update

- **Andrew “Buddy” Donohue**

Director, Division of Investment Management, U.S. Securities and Exchange Commission

```
var so = new SWFObject('http://www.ici.org/deployedfiles/ICI/Site
Properties/js/player.swf','mpl','360','264','9'); so.addParam('allowfullscreen','false');
so.addParam('allowscriptaccess','always'); so.addParam('wmode','opaque');
so.addVariable('file','http://www.ici.org/deployedfiles/ICI/Site
Properties/video/10_gmm_regulatory_update.flv'); so.addVariable('lightcolor','000066');
so.addVariable('screencolor','000066'); so.addVariable('dock','false');
so.addVariable('stretching','none'); so.write('mediaspace6');
```

The Way Forward for Retirement Saving

- **Phyllis Borzi**

Assistant Secretary of Labor, Employee Benefits Security Administration

- **Ralph Derbyshire**

Senior Vice President and Deputy General Counsel, Fidelity Investments

- **Anna Rappaport, FSA, MAAA**

Retiree and Consultant, Anna Rappaport Consulting

- **Steve Utkus**

Principal, The Vanguard Group

- [Powerpoint](#)

```
var so = new SWFObject('http://www.ici.org/deployedfiles/ICI/Site
Properties/js/player.swf','mpl','360','264','9'); so.addParam('allowfullscreen','false');
so.addParam('allowscriptaccess','always'); so.addParam('wmode','opaque');
so.addVariable('file','http://www.ici.org/deployedfiles/ICI/Site
Properties/video/10_gmm_retirement_savings.flv'); so.addVariable('lightcolor','000066');
so.addVariable('screencolor','000066'); so.addVariable('dock','false');
```

```
so.addVariable('stretching','none'); so.write('mediaspace7');
```

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.