

VIDEO

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Focus on Funds: 2017 General Membership Meeting Offers Dynamic Agenda

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ICI's General Membership Meeting (GMM) is designed to serve a fund industry facing rapid and significant changes. In the March 10, 2017, edition of *Focus on Funds*, James McNamara, GMM chairman and Goldman Sachs Mutual Funds president and CEO, describes what you can expect this year.

Transcript

Stephanie Ortvals-Tibbs, ICI Director, Media Relations: With the fund industry in the midst of significant shifts, are you ready to respond? At this year's ICI [General Membership Meeting](#) [GMM], we'll offer you new insight, information, and tools to help you do your job smarter, better, and faster, as I learned from ICI General Membership Meeting chair, Jim McNamara of Goldman Sachs Mutual Funds.

James McNamara, Goldman Sachs Mutual Funds president and CEO: So the asset management industry is going through fundamental change, whether it's the way we distribute products, how we manage money, how we serve the needs of our clients from a service perspective—these are all issues that we're going to tackle throughout the agenda.

Touching on a few: the macro environment is changing rapidly; we're at record equity levels; interest rates are rising; and, to that end, we're going to have a panel with some of the best investment strategists in the industry to talk about the best way to construct a portfolio within this advice, and how to meet your clients' needs from a goal-oriented perspective.

FinTech [financial technology]—something on everybody's mind. I'm excited to have a panel where we'll have individuals from the wirehouse industry, from the private-bank side of the business, and then, in particular, we'll have the cofounder of Betterment, a firm at the forefront of robo-advice, to give his perspective as to what the forward [thinking] is for robo-advice.

Then lastly, one panel I'm particularly excited about is our panel on diversity. We're going to talk about how to foster and manage diversity in the asset management industry, so I think that's a must see.

Ortbals-Tibbs: Jim, you've also adjusted the agenda this year to quicken the pace and insert more content.

McNamara: Yeah, that's right, Stephanie. I'm very excited about the agenda. We're going to keep it interesting, we're going to keep it relevant, and we're going to keep it moving.

As you know, we have concurrent sessions with [Operations](#), [Compliance](#), and [Board Directors](#). We have specialized sessions on ETFs, the international fund space—so, really, a participant in the GMM will be able to customize their own agenda for their own educational needs. We'll be focusing on domestic issues, on international issues—this conference really is a must-see conference.

I know for Goldman Sachs, we want to make sure we have a number of participants there to get the most out of the conference. It's a great way to network in the industry, it's a great way to learn what's going on, what's current—and frankly, it's a great way to learn what's going on with the competition.

Ortbals-Tibbs: This is the industry event of the year and registration is well underway. [Check it out now](#) on ICI's website.

Additional Resources

- [Register for GMM](#)
- [Personalize your program](#)
- [View highlights from 2016 GMM](#)