

ICI Convenes General Membership Meeting May 1–3

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Industry Leaders to Highlight Commitment to Shareholders in Changing Times

Washington, DC, April 8, 2013 - The mutual fund industry will gather for the Investment Company Institute's 55th Annual [General Membership Meeting](#) (GMM) on May 1–3 in Washington, D.C. Prominent government, industry, and Wall Street leaders will gather to share perspectives on how the fund industry continues its unwavering commitment to shareholders during changing market environment. The GMM is combined with three simultaneous conferences, so attendees can build a program that aligns with their particular interests over the three days.

This year's GMM conference theme is "Unchanging Commitment in a Changed World." Throughout the conference, fund industry experts will discuss the implications of an increasingly global economy and how global trends in investing and regulation affect funds and their shareholders.

The GMM program features leaders from multiple industries and roles

- Mary John Miller, U.S. Department of the Treasury's Under Secretary for Domestic Finance, will address the GMM Policy Forum on Wednesday, May 1.
- Lloyd C. Blankfein, Chairman and CEO of The Goldman Sachs Group, Inc., will engage in a topical conversation with ICI President and CEO Paul Schott Stevens on Thursday, May 2.
- On Thursday, political scientist Ian Bremmer, President and Founder of Eurasia Group, will address today's global political risks and how political developments move markets.
- Former U.S. Senators Kent Conrad (D-ND) and Judd Gregg (R-NH) will share their views about fiscal reform and the role politics must play in debt reduction on Friday, May 3. The Washington insiders will bring their insights from serving on the National Commission on Fiscal Responsibility and Reform (the Simpson-Bowles Commission).
- In a special session highlighting China's growing influence on the global economy, Carl E. Walter, formerly of J.P. Morgan China, author of *Red Capitalism: The Fragile Formation of China's*

Extraordinary Rise, will discuss the evolution and global role of China's financial system. In a discussion moderated by William F. "Ted" Truscott, GMM chairman and CEO of Global Asset Management for Columbia Management and Threadneedle Investments, Walter will engage with Peter Alexander, Principal of Z-Ben Advisors, and George Ding, CEO of Hua An Funds. The session takes place Thursday.

Many fund leaders will participate in GMM sessions

In a panel moderated by Marie Chandoha, President and CEO of Charles Schwab Investment Management, industry leaders will reflect on the core values of the fund industry, identify future opportunities for shareholders, and discuss what lies ahead for the business. Elizabeth Corley, Global CEO of Allianz Global Investors, will lend a European perspective to the topics. Other panelists include Scott Powers, President and CEO of State Street Global Advisors; Alan Reid, CEO of Forward Management; and Robert Reynolds, President and CEO of Putnam Investments.

William "Bill" Glavin, Chairman, President, and CEO of OppenheimerFunds, will lead a panel of executives representing key distribution channels for funds in discussing the challenges of uncertain markets and the outlook for equity and fixed income. Panelists include Don Froude, President, The Personal Advisors Group, Ameriprise Financial; John Thiel, Head of Merrill Lynch Wealth Management, Bank of America Merrill Lynch; and Jim Weddle, Managing Partner, Edward Jones.

GMM features programs on Operations and Technology; Compliance; IDC Directors Workshop

The GMM features three other conferences that will focus on specific aspects of fund management and oversight, including the [Operations and Technology Conference](#), the [Mutual Fund Compliance Programs Conference](#), and IDC's Fund Directors Workshop.

The GMM will also host the fifth annual [Legal Forum](#), in which law firms showcase their investment management expertise through brief 30-minute presentations, will take place in the GMM Exhibit Hall on May 1 and 2.

Event location and media attendance details:

[Washington Marriott Wardman Park](#)

2660 Woodley Road, NW
Washington, DC 20008

Media pre-registration is strongly encouraged and will expedite entry to GMM. Reporters should contact Inga Vitols at (202) 326-5838, inga.vitols@ici.org, to register. The GMM and Operations and Technology Conference are open to the media. The Mutual Fund Compliance Programs Conference and IDC's Fund Directors Workshop are **closed** to the media.

Credentialed media may broadcast or record only the GMM sessions as outlined by ICI Broadcast Guidelines. Live or taped webcasting of entire sessions is not allowed except by express prior written

permission from ICI Media Relations. Members of the media seeking video interviews with presenters and attendees should arrange those sessions in advance; such interviews may be conducted only in designated locations. Rooms for video recording may be reserved through the Media Relations division. Please contact Stephanie Ortbals-Tibbs at (202) 326-5840 for more detail.

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