

## General Membership Meeting to Feature Wide Range of Leaders

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## Where Funds, Film, and Coffee Meet

**Washington, DC, April 10, 2012** - The Investment Company Institute's 54th Annual [General Membership Meeting](#) (GMM) will bring together a wide range of experts—from mutual fund industry leaders to regulators to CEOs to filmmakers—to share their insights and how those relate to asset management. The meeting will be held May 9–11 in Washington, D.C. The GMM is combined with a number of specialized programs to offer a broad range of industry topics.

This year's GMM conference theme is "Lasting Values—Challenging Times." Throughout the conference, fund industry leaders will share their insights on the future of investment funds and how evolving regulatory policies and industry action will best serve investors.

### **The GMM program features leaders from multiple industries and roles**

- Howard Schultz, Chairman, President, and CEO of Starbucks, will deliver a luncheon address on Thursday, May 10.
- In the closing session—"Managing Chaos!"—George Lucas, Founder, Producer, and Director of Lucasfilm, Ltd., and Mellody Hobson, President of Ariel Investments and GMM chairman, will explore the successes, challenges, and parallels of leadership in film production and asset management.
- Paul Haaga, Chairman of the Board, Capital Research and Management Company, will moderate a GMM leadership panel on Thursday, May 10. The panel will reflect upon the industry's core values and identify opportunities for the future of the fund business and shareholders. Participants will be Marie A. Chandoha, President and CEO, Charles Schwab Investment Management, Inc.; Gregory Fleming, President, Morgan Stanley Investment Management; Ronald O'Hanley, President, Asset Management and Corporate Services, Fidelity Investments; and Kenneth Olivier, President and CEO, Dodge & Cox.

- SEC Chairman Mary Schapiro will review her agency's agenda and discuss key regulatory issues in a morning address on Friday, May 11.

## **GMM will feature global fund leadership**

For the first time at GMM, a panel of international fund leaders will discuss global fund management. The panel, led by Dan Waters, Managing Director of ICI Global, will consist of Vijay C. Advani, Executive Vice President, Global Advisory Services, Franklin Resources, Inc.; Christian Dargnat, Chief Executive Officer, BNP Paribas Asset Management; Andrew Formica, Chief Executive, Henderson Group plc; and Timothy F. McCarthy, Chairman and CEO, Nikko Asset Management Co.

## **Retirement and distribution panels feature key mutual fund experts**

In one of two concurrent sessions on Thursday, May 10, a panel of retirement experts from the fund industry discusses what may lie ahead for the retirement market. The second concurrent panel, offered jointly as part of GMM and the Operations and Technology Conference, will explore the implications for the fund industry of the continuing transition to fee-based advisory programs.

## **GMM features programs on Operations and Technology; Compliance; IDC Directors Workshop and Legal Forum**

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 the [Investment Company Directors Workshop](#). The GMM and Operations and Technology Conference are open to the media.

The GMM will also host the fourth annual [Legal Forum](#), in which law firms will showcase their asset management expertise through brief 30-minute presentations. The Legal Forum is open to attendees at all four major GMM events.

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](mailto:inga.vitols@ici.org) to register to attend.

Attending credentialed media may use video, still photography or audio recordings for non-commercial use. Videotaping and/or limited broadcast of speakers and their materials is permitted only in the general sessions in the Marriott Ballroom. Live or taped webcasting of entire sessions is not allowed. Interviews with presenters and attendees should be arranged in advance and conducted only in designated locations. Additional broadcast guidelines are in place: please contact Stephanie Orbals-Tibbs at (202) 326-5840 for more detail.

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