

U.S. Treasury and SEC Heads to Address Economic and Regulatory Issues During ICI Annual Meeting May 4-6

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Agenda Also Includes An Examination of Global Retirement Issues Features Other Policymakers, Industry Leaders

Washington, DC, April 12, 2011 - This year the Investment Company Institute's 53rd Annual [General Membership Meeting](#) (GMM) will feature remarks by the U.S. Treasury Secretary and the Chairman of the Securities and Exchange Commission (SEC) – each separately addressing key economic and regulatory issues. The meeting will be held May 4–6 in Washington, D.C. The GMM is combined with a number of specialized programs to provide a unique opportunity for attendees to tailor their programs to their interests.

The GMM features a blend of government leaders and asset-management and finance experts:

- Treasury Secretary Timothy F. Geithner will speak at GMM's opening event, a policy forum, on Wednesday, May 4. Geithner will share his views on the state of the economy, both here and abroad; state and federal fiscal challenges; deficit reduction; and tax reform in an engaging discussion with ICI President Paul Schott Stevens.
- SEC Chairman Mary Schapiro will review her agency's agenda in a morning address on Friday, May 6. Schapiro's agency is in the midst of implementing the rules coming out of the regulatory reform law enacted last year and is deeply involved in various aspects of ensuring investor protections in mutual fund investing.
- Former White House Chief of Staff Erskine B. Bowles, and former U.S. Senator Alan K. Simpson (Wyo.)—co-chairs of the National Commission on Fiscal Responsibility and Reform—will discuss

recommendations designed to balance the federal budget and improve the economy's long-term outlook. The panel, moderated by ICI's president and CEO Paul Stevens, will be held on Friday, May 6.

- William F. Glavin Jr., chairman, president and CEO of OppenheimerFunds, Inc.; Ronald P. O'Hanley, president of Asset Management and Corporate Services, Fidelity Investments; and James I Robertson, senior managing director, director, and CEO of Invesco Perpetual (U.K.) will appear on a leadership panel Thursday, May 5, to discuss opportunities for fund shareholders and the future of the fund business. George Gatch, CEO of J.P. Morgan Funds, will be the moderator.
- John Micklethwait, editor-in-chief of The Economist, book author, and an expert on globalization and finance, will deliver the luncheon address on Thursday, May 5.

May 6 panel discussion focuses on global retirement issues

In addition, on Friday, May 6 a panel of international experts from the fund industry will explore lessons for the U.S. retirement system from foreign private pension systems. The experts from around the world will discuss draw-down strategies, mandatory enrollment, and mandatory annuitization.

GMM features Operations and Technology; Compliance; IDC Conferences and Legal Forum

This year's GMM conference theme is "The Way Forward With Fund Investors." Throughout the conference, industry leaders will share their insights on the industry's future and how evolving regulatory policies and industry action will best serve investors.

The GMM features three other conferences that specialize on various fund aspects, including the [Operations and Technology Conference](#), the [Mutual Fund Compliance Programs Conference](#), and the [Investment Company Directors Workshop](#).

The GMM will also host the third annual [Legal Forum](#), in which law firms with asset management practices will offer 30-minute presentations on an array of timely topics of importance to the fund industry

Event location and media attendance details:

[Washington Marriott Wardman Park](#)

2660 Woodley Road, NW

Washington, DC 20008

Reporters should contact Inga Vitols at (202) 326-5835/inga.vitols@ici.org to register to attend. The [GMM](#) and [Operations and Technology Conference](#) are open to the media.