

608 - NEW YORK, CONSULATE GENERAL

UNITED STATES OF AMERICA

TRACKING: ACTIVITIES UNDERTAKEN IN QUARTER

RESULTS REPORTED

QUARTER : 1

INVESTMENT SEMINAR FOR PORTFOLIO INVESTORS.
PRODUCTION & ISSUANCE OF ONE STOP SERVICES
BROCHURE.
SEMINAR ON TAX REFORM.
FOLLOW-UP ON OVER 200 INVEST. PROSPECTS AND
FAVOURABLY CONCLUDED AT LEAST 2 NEGOTIATIONS.
ESTABLISH A NEW MANUAL 'LEAD TRACKING' SYSTEM.

HIGHLY SUCCESSFUL SEMINAL FOR 75 PORTFOLIO IN-
VESTORS INCLUDING PRESENTATIONS BY TOP CDN SE-
CURITIES ANALYSTS WAS HELD ON APRIL 8.
ONE STOP SERVICES BROCHURES WERE COMPLETED &
DISTRIBUTED TO 500 PROSPECTS AND INTERESTED
INDIVIDUALS/CORPORATIONS. -TAX CLIENTS JOINTLY
SPONSORED WITH PACE UNIVERSITY--QUALITY AUDIENCE
TO LISTEN TO QUALIFIED PANEL OF SPEAKERS. 5 NEGO
CONCLUDED, TOTALLING OVER \$3.3M. -NEW MANUAL
'LEAD TRACKING SYSTEM' IN PLACE & OPERATING.

QUARTER : 2

TO BEGIN PLANNING FOR MISSION OF SENIOR INSTI-
TUTIONAL INVESTMENT EXECUTIVES TO OTTAWA.
COMPLETE MAILING TO IDAC & OICD MEMBERS TO BUILD
& INDEX A VIDEO TAPE & BROCHURE LIBRARY.
WRITE A MKTG PLAN TO UNDERTAKE A MORE PRODUCTIVE
MKTG STANCE IN CONGEN & WILL OBTAIN FUNDING FOR
MKTG PLAN.
CO-ORDINATE ON ARTICLE FOR AREA DEV. MAGAZINE.
HIRE A PERMANENT SECRETARY & A PROGRAM ASSISTANT

-PROG. WORKED OUT & CONFIRMED WITH OTT., INCL.
PART'N OF MIN. OF FIN. & GOVERNOR OF BANK OF CDA
-WITH CDN INVSTMT DEALERS, IDENTIFIED LIST OF
INVITEES FOR MISSION. CONTACTED OTHER USA CON-
GENS TO PARTICIPATE IN MISSION. -ISSUED INVITA'NS
TO INVITEES. -WE HAVE REC'D VIDEO TAPES FM 58
ORG'NS & THESE ARE NOW BEING INDEXED. WE PLAN TO
SEND COPIES OF THE INDEX TO ALL OTHER CONGENS IN
THE USA. -MKTG PLAN COMPLETED - OBTAINED FUNDING
SUPPORT THROUGH INVSTMT CDA FOR PURCHASE OF

QUARTER : 3

INSTITUTIONAL INVESTORS TRIP TO OTTAWA TO MEET
WITH MINISTER OF FINANCE, GOVERNOR OF THE BANK
OF CDA & SENIOR GOV'T OFFICIALS; (02) ECONOMIC
BRIEFING IN NEW YORK WITH SENIOR FINANCE & BANK
OF CDA OFFICIALS; (03) VISIT OF MIN. WILSON TO
NEW YORK. ORGANIZED VISIT IN CONJUNCTION WITH
CDN SOCIETY.

EXCELLENT FEEDBACK. FIDELITY, A LARGE USA MONEY
MANAGER, DECIDED TO OPEN A CDN FUND AS A RESULT
OF TRIP; (12) KEVIN LYNCH, GEN. DIR., FISCAL POLICY
& ECONOMIC PROGRAM, FINANCE, & BILL WHITE, ADVISER
BANK OF CDA, BRIEFED SENIOR EXECS OF T. O. DOM-
INION BANK, INSTITUTIONAL CLIENTS OF CAN-AM
SECURITIES, & CDA WATCHERS ON CDN ECONOMIC &
MONETARY POLICY; (13) OVER 350 FIN. EXECS, MONEY
MGRS, TRADE REPS, CORP. OFFICERS, ATTENDED KEYNOTE
CDN SOCIETY SPEECH BY MIN. MIN. ALSO MET WITH

QUARTER : 4
