

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

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