

*A Unique Executive Development Program*



# MIS Audit Leadership Institute™



**August 16-20, 2010**  
**Boston, MA**

In This Five-Day, Fast-Track Program You Will:

- Find out what you can do to ensure your department is positioned to add real value in turbulent times
- Explore the new directions of the audit leader's position and what you must do to successfully lead a risk-based audit department in 2011 and beyond
- Cover conflict resolution and negotiation techniques that will foster sustained organizational change
- Learn proven strategies for improving your communication with the audit committee, executive management, and your audit team
- Examine the role of the audit leader in ensuring the organization is proactively safeguarding against fraud and GRC failures

**[www.misti.com](http://www.misti.com)**

Web E-Z Access **OAM510**

# W E L C O M E

## Welcome to the MIS Audit Leadership Institute...

...and to five high-impact days packed with the strategies, tactics, and techniques you need to be a truly effective audit leader.

To keep pace in today's difficult regulation-driven, technology-laden business environment, audit leaders are being challenged to rethink the traditional approaches they used in the past. In response to this very real need, we have designed the *MIS Audit Leadership Institute* to equip you with the critical skills necessary to successfully guide your audit organization in 2011 and beyond.

### Exclusively for Audit Leaders...

Unlike other leadership development programs, the *MIS Audit Leadership Institute* focuses exclusively on the needs of audit executives. That means we have eliminated everything but the topics critical to helping you improve and sustain your performance as a leader and that of the audit department.

Each day you will drill down to the essentials of effective audit leadership and the complex issues you face every day on the job. With a range of topics that includes adding value in turbulent times, assessing your leadership style, conflict resolution and negotiation techniques, strategies for communicating with audit and executive committee members, innovative recruiting practices, and current fraud challenges, this five-day fast-track event covers the full spectrum of crucial leadership areas.

But that's not all. In the company of your colleagues, you will learn in an environment that encourages networking and idea-sharing. Expert panels, case studies, team exercises, and peer brainstorming will accompany traditional sessions to foster the give-and-take that is such a valuable part of the learning process.

### ...by Hands-On Audit Leaders

Because we know that any training program is only as good as its instructors, we have assembled a faculty of the best. **Joel F. Kramer, CPA**, *Managing Director of MIS' Internal Audit Division*; **Ann Butera, CRP**, *Founder and President of The Whole Person Project, Inc.*; and **Cynthia Cooper, CPA, CISA, CFE**, *Chief Executive Officer, The CooperGroup, LLC; Author of Extraordinary Circumstances; and WorldCom whistleblower*, will share their hard-won expertise and provide proven strategies for breathing new life into your audit department.

To ensure you enjoy a fulfilling learning experience, we are limiting enrollment. This event has been a consistent sell-out, so I urge you to register today and save your place at this unique executive development program.

We look forward to being your host in Boston.

Sincerely,



Linda Burton  
*President and CEO*

## WHO SHOULD ATTEND

Managers, Directors, Supervisors, newly appointed CAEs, and other audit executives who want to learn new approaches to leading an IA department in today's changing business climate

## What Past Attendees Have to Say

*"Positive experience; would recommend to others. Liked the group dynamics with all leaders. Got a lot of value out of the real-life discussions during roundtables."* Amber Amandi, Manager, Internal Audit, Knowledge Learning Corp.

# MIS AUDIT LEADERSHIP INSTITUTE

## Benefits of Attending

*You will:*

- Join your colleagues for five intensive days that mix traditional learning with panel discussions, peer brainstorming, case studies, and team exercises
- Benefit from the hands-on expertise of a faculty of respected industry leaders
- Learn proven strategies for attracting and motivating top-notch staff
- Discover how you can integrate anti-fraud and GRC programs into your departmental strategies
- Get tips validating processes for risk and compliance
- Cover enterprisewide risks and how to get a handle on them
- Explore your role as a mentor and how you can help develop future leaders in your organization
- Review the six characteristics of effective leaders
- Gain strategies for adjusting your leadership style when dealing with the audit committee, executive committee members, and your audit team
- Learn how to assess your audit situation to identify decision-makers, stakeholders, and other influencers
- Examine three methods for managing existing conflict
- Find out how to build a fraud response into your strategic audit plan
- Uncover what you can eliminate from your list of responsibilities and how you can work smarter, not harder
- Get proven pointers for making audit processes more efficient and effective

## Special Features of the MIS Audit Leadership Institute

- **Limited Attendance** allows you to actively participate and interact with other audit leaders and our expert faculty
- **All Institute Topics** are geared to boosting your effectiveness as an audit leader
- **Unparalleled Networking** in sessions, informal discussion groups, receptions, and after-hour activities means that you will have ample opportunity to expand your personal contacts and connect with your colleagues
- **Participants Are Eligible to Earn 36 CPE Credits** towards professional accreditation requirements
- **A Mix of Learning Approaches** that includes traditional sessions, case studies, team exercises, panel discussions, and peer brainstorming
- **The Hilton Boston Back Bay** puts you in the heart of all the Hub has to offer. Shopping, fine dining, a variety of museums, top-notch theater, and Fenway Park are all within easy reach. *And to help extend your stay and enjoy Beantown's attractions, we've made arrangements for you to receive the special MIS room rate for the weekends before and after the event.*



## What Past Attendees Have to Say

*"Good program that explores key audit challenges. I enjoyed hearing the different perspectives of other audit leaders."  
Derek Butler, Senior Manager, Internal Audit, Washington Gas*

*"Every topic discussed during the five days fell right within the needs of my audit department. Very timely."  
Hal Greig, Compliance and Internal Audit Manager, ABX Air*

*"Very positive. The speakers were well prepared, knowledgeable, and engaging. The ability to interact with other audit leaders enabled me to learn new audit practices to bring back to my department."  
Brad Levin, Audit Manager, Sony Corporation of America*

**Monday, August 16, 2010**

9:00 am – 5:00 pm

## **Day One: Leading a Risk-Based Audit Department**

**A detailed exploration of what is expected of today's audit leaders**

*Instructor: Joel F. Kramer, CPA, Managing Director, Internal Audit Division, MIS Training Institute*

### **What It Takes to Be a World-Class Audit Leader of a World-Class Audit Function in Today's Turbulent Times**

- What makes an audit department world-class
- Attributes of visionary audit leaders

### **The Greatest Challenges Facing Audit Leaders in the Next Three Years**

- Redesigning audit processes around evolving technologies
- Harnessing data
- Developing and maintaining strategic relationships with management

### **Changing Dynamics of the Manager's Position**

- Why the traditional role of the manager is flawed in today's business environment
- Developing an internal audit risk universe that reconciles to your ERM
- Getting involved in planning and initial risk assessment
- Ensuring your team thinks about the audit report from day one of the engagement
- Maintaining constant communication with key business units and monitoring key processes
- Key to success: understanding your business and its risks, and not just audit

### **The ERM Benefits of a Robust GRC Program**

- Fraud and the need to take a proactive role in preventing and detecting it
- Prioritizing governance
- Ensuring management's buy-in on control ownership
- Validating processes for risk and compliance
- Addressing entity- and process-level controls
- Integrating risks identified in SOX compliance into your ERM

### **Leading a Successful Risk-Based Audit Department**

- Staying abreast of enterprisewide risks
- Maintaining respect for yourself and the IA function
- Understanding and using the latest audit tools for continuous auditing, compliance, and data mining
- Building an effective team
- Your role as a mentor
- Establishing and maintaining good relationships with key business leaders
- Keeping pace with legislation that impacts your organization: SOX, HIPAA, and more

### **Balancing the Expectations of Multiple Customers**

- Developing a mutually beneficial relationship with the audit committee
- Helping executive management meet their business goals
- Proven methods for keeping external auditors informed
- Steps you can take to help process owners maintain efficient systems

### **People, People, People: Getting the Most Out of Multiple People Resources**

- Innovative recruiting practices
- Managing staff turnover
- Dealing with, and if necessary, removing problem employees
- Minimizing the probability of a bad hire
- Affordable strategies for lighting a fire under your staff while avoiding burnout
- Maximizing your investment in cosourcing, outsourcing, and insourcing

### **One CAE's Greatest Challenges and Greatest Successes**

*Guest Speaker: Jayne K. Donahue, Executive Vice President and General Auditor, State Street Corporation*

### **Cocktail Reception: 5:00 pm**

**Tuesday, August 17, 2010**

8:30 am – 6:30 pm

## **Day Two: Core Competencies of Internal Audit Leadership**

**World-class audit leadership skills for leading a world-class audit department**

*Instructor: Ann Butera, CRP, Founder & President, The Whole Person Project, Inc.*

### **The Art of Effective Audit Leadership: Is Your Style Helping or Hurting?**

- The six characteristics of effective leaders and how you measure up
- Assessing your preferred leadership style: its benefits and liabilities
- Strategies for adjusting your leadership style when dealing with the audit committee, executive committee members, and your audit team members

### **How to Be a Trusted Advisor: Using Influence and Building Integrity**

- The five behaviors of trusted advisors
- Assessing your audit situation to identify decision-makers, stakeholders, and other influencers
- Identifying your preferred influencing style and exploring different ones
- Determining the most appropriate influencing style for your audit situation

### **Lunch and Free Time: 11:30 am – 2:00 pm**

### **Using Conflict Resolution and Negotiation Techniques for Sustained Organizational Change**

- Defining Audit's role in creating sustained organizational change
- Recognizing the critical conversations and circumstances that lead to conflict
- Preventing conflicts from occurring
- Three methods for managing existing conflict
- Using negotiation and other techniques to overcome client objections to audit concerns and to implement change

**5:00 pm – 6:30 pm** *Join us for pizza and to puzzle out a real-world case study on harnessing and managing the different generations in the workplace.*

# SHIP INSTITUTE AGENDA

**Wednesday, August 18, 2010**

8:30 am – 4:30 pm

## **Day Three: Overcoming Audit Challenges**

**Removing the obstacles to an effective audit function**

*Instructor: Ann Butera CRP, Founder & President, The Whole Person Project, Inc.*

## **Enhancing Audit Committee and Senior Management Relations and Communication**

- Building/maintaining audit/executive committee relationships
- Clarifying the roles of the board and the audit committee and Internal Audit's interactions with each
- Defining above- and below-the-line activities
- The attributes of effective boards
- Best practices for boards and how your organization compares
- Leveraging your role to support the audit committee and executive management
- Balancing the detailed and summary information you communicate
- Organizing your message to satisfy your audience's need
- Delivering high-impact presentations to the audit and executive committees

## **Developing Audit Reports That Foster Change**

- Using an attention-getting, reader-friendly layout
- Employing mind mapping to organize and consolidate issues
- Communicating audit and SOX concerns for maximum impact
- Identifying opportunities for expanded and enhanced reporting in a post-SOX environment

## **Enhancing Bench Strength and Building the Right Team**

- Identifying the competencies needed for a risk-based department
- How to attract and retain change agent-oriented auditors
- Harnessing the generational differences in the workplace to create audit teams that can handle all types of audits
- Using "the nine boxes" to develop succession plans and evaluate performance
- Leveraging MBO programs to build critical skills needed for succession planning

**Thursday, August 19, 2010**

8:30 am – 5:00 pm

## **Day Four: Integrating Anti-Fraud and GRC Programs into Your Departmental Strategies**

**Your Role in Protecting Your Organization from GRC and Anti-Fraud Failures**

*Instructor: Cynthia Cooper, CPA, CISA, CFE, Chief Executive Officer, The CooperGroup, LLC; Author of Extraordinary Circumstances; and WorldCom whistleblower*

## **Guiding Your Organization to a Strong Ethical Foundation That Will Lead to Sustainable Success**

- Determining whether your organization is at increased risk for fraud and governance failures
- Unraveling the largest frauds in history
- The financial crisis: GRC and anti-fraud lessons learned for audit leaders, boards, and executives
- Interacting with the board and ensuring that IA plays a role

## **Building a Best-of-Class GRC and Anti-Fraud Program**

- The governance debate: What is best practice?

- Critical elements of a strong GRC and anti-fraud program
- How audit, compliance, and risk leaders can avoid the silo mentality
- Current trends and seminal events driving GRC strategy and anti-fraud programs to a new level
- Each group's role in the GRC and anti-fraud strategy

## **Taking Internal Audit to the Next Level in the Fight Against Governance Failures and Fraud**

- The audit leader as a catalyst for change
- Building a GRC and fraud response into your strategic audit plan
- Integrating anti-fraud practices into the audit process
- Assembling and educating your team

## **Managing a Fraud Investigation: Defining Differences Between an Investigation and an Audit**

- Considerations for each phase of an investigation
- Fraud schemes and investigation tools and techniques
- Documenting and reporting the findings of an investigation

## **Corporate Fraud and the Aftermath**

- What to expect
- How audit leaders can help the organization move forward

## **Industry Leader Forum: 3:00 pm – 5:00 pm**

To cap off your day, you will be joined by audit executives from the Boston area who will open the floor to questions and provide their enlightened perspectives on the challenges of leading a contemporary audit department in these difficult times.

## **Dining out in Boston: 5:30 pm**

**Friday, August 20, 2010**

8:00 am - 9:00 am

## **Day Five: Characteristics of Top-Notch Audit Leaders**

*Guest Speaker: Lawrence J. Harrington, Vice President, Internal Audit, Raytheon Company*

9:00 am – 12:00 pm

## **The Critical Business of Running an Effective and Efficient Internal Audit Department**

**Strategies for keeping the audit function running smoothly**

*Instructor: Joel F. Kramer, CPA, Managing Director, Internal Audit Division, MIS Training Institute*

## **Eliminating What You Do Not Need: Working Smarter, Not Harder**

- How to continually do 100 things 1% better
- Determining the minimum information needed to manage your IA department
- Managing the annual audit plan process more efficiently
- Maximizing the use of technology

## **Making the Audit Process More Effective and Efficient**

- Planning further ahead of fieldwork
- Using subject-matter experts to identify risks early in the audit process
- Identifying and using the right type of audit program
- Spending more time in the planning process
- Strategizing when to review work
- Thinking report from the inception of fieldwork

## **Incorporating Best Practices into Your Audit Processes**

# FACULTY

## Ann M. Butera, CRP



Ann M. Butera is the Founder and President of The Whole Person Project, Inc., an organizational development consulting firm that specializes in assisting companies to introduce, handle, and manage change. As a lecturer and trainer, she provides proven strategies that get results in the areas of

corporate governance, auditing and internal controls, business risk assessment, leadership and managerial skill development, and project planning and management.

Ms. Butera has authored numerous business articles in such trade journals as *Bank Accounting & Auditing Magazine* and the *ABA Consumer Banking Digest*, and has been quoted in *The New York Times* and *Working Woman* magazine, among other publications. She is a columnist for the Indiana Bankers Association's *Hoosier Banker* magazine and for Protiviti's Web site, *KnowledgeLeader*.

Ms. Butera was an instructor at the BAI Bank School, the Graduate School of Banking at University of Wisconsin at Madison, and the Southeastern School for Sales Leadership at Vanderbilt University. She was an Adjunct Professor in the Business Department of L.I. University and a Core Faculty Member of the ABA's cable television show *American Financial Skylink*. In addition, she has hosted the radio show, *Business Forum*.

Beginning in 1984 and continuing on an almost annual basis thereafter, Ms. Butera has been cited in *Who's Who*. In 1990, Women On The Job honored her with the Business Achievement Award. She serves on the Advisory Board of the Long Island Development Corporation. Ms. Butera is a member of the IIA, the American Society for Training and Development, and the World Future Society.

## Joel F. Kramer, CPA



Joel F. Kramer is Managing Director of the Internal Audit Division of MIS Training Institute. Mr. Kramer joined MIS in 1982, and introduced its highly acclaimed Internal Audit curriculum. Prior to joining MIS, Mr. Kramer was Director of Internal Audit for Instrumentation Laboratory, Inc. He also

held the position of Internal Audit Manager for the Gillette Company, and he spent five years with Coopers & Lybrand.

Mr. Kramer is a recognized speaker at international, national, and regional audit conferences. He has addressed many Institute of Internal Audit Chapters, and has conducted in-house training programs for major organizations throughout North and South America and Europe.

A former Regis College faculty member, Mr. Kramer has written several articles on productivity and project management for *The Internal Auditor and Internal Auditing Magazine*, and has developed three highly successful videos, *Day One in Internal Auditing*, *Modern Audit Tools and Techniques*, and *Project Management*. He is a past member of the Board of Governors of the Greater Boston Chapter of the IIA, and currently serves on the Advisory Board of the Louisiana State University Center for Internal Auditing.

## Cynthia Cooper, CPA, CISA, CFE



Ms. Cooper is CEO of The CooperGroup, LLC, a management consulting firm that provides services in the areas of internal audit, ethics and compliance, fraud prevention and detection, board consultation and education, and enterprise risk management. Ms. Cooper has more than twenty years of diversified

corporate and consulting experience. As Vice President and Chief Audit Executive for MCI she helped the company move forward and successfully emerge from bankruptcy after the WorldCom fraud – to date the largest corporate fraud in history – which she and her team identified and unraveled in 2002. In July 2004, Ms. Cooper left MCI to launch her own consulting firm. Today Ms. Cooper is a consultant; internationally recognized speaker; and the author of *Extraordinary Circumstances* (John Wiley & Sons), a book that discusses her experiences as a corporate executive and the lessons learned at WorldCom. She currently serves on advisory boards for Louisiana State University, Lehigh University, and Mississippi State University.

Prior to joining MCI, Ms. Cooper worked in public accounting for Deloitte & Touche, and for PricewaterhouseCoopers. Ms. Cooper serves on the Board of Regents for the ACFE. She has previously served as a member of the Standing Advisory Group of the Public Company Accounting Oversight Board (PCAOB). Ms. Cooper has served on panels with notables such as Brian Williams, Anderson Cooper, Donna Brazile, and Grover Norquist; and has appeared on such programs as *Fox Business' America's Nightly Scoreboard*, PBS's *Tavis Smiley*, NBC's *The Today Show*, ABC's *This Week with George Stephanopoulos*, CSPAN's *BookTV*, and CNBC's *The Big Idea with Donnie Deutsch* and *Squawk Box*. Ms. Cooper was named one of *Time Magazine's* Persons of the Year for her role in uncovering the WorldCom fraud.

## What Past Attendees Have to Say

*"A wealth of key hot topics of concern to audit leaders today."* Wendy Rockett, Senior Manager, Internal Audit, Reynolds American Inc.

*"Informative. It helped me to reassess my audit skills, both strengths and areas of improvement."* Robert Kelly, Director, IT Audit, Cephalon, Inc.

*"I gained a lot of valuable information from the varied speakers."* Christy Arnold, Audit Manager, Arvest Bank Operations

# REGISTRATION INFORMATION

## To Register

**Mail:** The registration form and send with your check to: MIS Training Institute, 498 Concord Street, Framingham, MA 01702-2357

**Call:** 508-879-7999

**Fax:** 508-872-1153

**E-mail:** [mis@misti.com](mailto:mis@misti.com)

**Web:** [www.misti.com](http://www.misti.com) E-Z Access Code OAM510

**IMPORTANT:** Please refer to the Registration Code on the back cover when you register.

## Times

The *MIS Audit Leadership Institute* registration desk at the Hilton Boston Back Bay will be open Monday, August 16, 2010, at 8:00 am.

## Tuition

Tuition is \$3395 (\$3495 after August 9, 2010). Your tuition must be paid in advance by cash, company check (US dollars), VISA, MasterCard, Diners Club, Discover, or AMEX. Tuition includes the 5-day program, *Institute* materials, refreshments, continental breakfasts, lunch on Monday through Thursday, dinner on Tuesday and Thursday, and the evening reception on Monday.

## MIS Cancellation Policy

A full refund less a \$100 administrative fee will be given for cancellations received 15 days or more before the event. Tuition is non-refundable for cancellations made 14 days or less before the event. You may, however, transfer your tuition to another MIS Training Institute event, less a \$195 administrative fee. Transfers are valid for 12 months from the time of initial cancellation. Substitutions are welcome at any time. Those who do not cancel before the event date and who do not attend are responsible for the full non-refundable, non-transferable tuition. To cancel, call customer service at 508-879-7999.

## Reception

You will be welcomed at a cocktail reception on Monday evening at 5:00 pm.

## CPE Credits

As a participant you are eligible to receive 36 hours of CPE Credits toward professional recertification requirements for the training program.



MIS Training Institute is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Web site: [www.nasba.org](http://www.nasba.org).

**Advance Preparation:** *None*

**NASBA Field of Study:** *Business Management & Organization*

**Delivery Method:** *Group-Live*

## What to Wear

Business casual is appropriate attire for the *MIS Audit Leadership Institute*. We suggest that dress in layers for your own comfort.

## The MIS High-Yield/No-Risk Guarantee

Attend this program and receive tools and techniques that will help you do your job better. If you feel you did not benefit from this program, please write to us on your organization's letterhead within 30 days of attending the event and MIS will give you a full credit toward another program.

## Accommodations

A block of rooms has been reserved on a space-available basis at the **Hilton Boston Back Bay until July 26, 2010** at a rate of \$179 per night. After that date, reservations may be made on a space-available, regular-rate basis. To book your reservations, contact the Hilton Boston Back Bay, 40 Dalton Street, Boston, MA 02115, or call 617-236-1100. *And to help extend your stay and enjoy Boston's attractions, we've made arrangements for you to receive the special MIS room rate for the weekends before and after the event.*

## The Hilton Boston Back Bay

Ideally located in the heart of Boston's most picturesque area and historic Back Bay neighborhood, the Hilton Boston Back Bay is only 4 miles from Logan International Airport. Best of all, you can step outside the door and enjoy some of Boston's leading attractions and historical sites. Fenway Park, the Museum of Fine Arts, Symphony Hall, fashionable Newbury Street, Copley Place, and the Boston Common are just some of sights easily accessible from the hotel. All guestrooms have spectacular city views, and guests enjoy amenities such as a weekday newspaper, on-command movies and video games, as well as a newly renovated fitness center and indoor pool open 24 hours for your fitness needs. Boodles Restaurant offers everything from a sumptuous meal to light snacks, a favorite cocktail, or one of Boston's famous micro brews.



## About MIS Training Institute

*Founded in 1978, MIS Training Institute is the international leader in audit and information security training, with offices in the US, UK, and Asia. MIS' expertise is drawn on experience gained in training more than 250,000 delegates across five continents. MIS offers conferences, in-house training, and more than 90 seminars in the areas of Internal and IT Auditing, Sarbanes-Oxley Compliance, Information Security, Network Infrastructures, Operating Environments, and Enterprise Applications, as well as Web-based training at [www.misti-online.com](http://www.misti-online.com). MIS is a Euromoney Training Group company.*

A Unique Executive Development Program



# MIS Audit Leadership Institute™



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Framingham, MA 01702-2357

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August 16-20, 2010  
Hilton Boston Back Bay  
Boston, MA



*IMPORTANT: Please have your Registration Code available when you register.*

Registration Code:

OAM510E / PDF

[www.misti.com](http://www.misti.com)

Web E-Z Access **OAM510**

## Registration Form

Name  Mr.  Mrs.  Ms.  Dr.  Prof. For Name Tag

Job Title

Organization/Company Industry No. of Employees

E-Mail Address (Required)

Address Mail Stop/Floor

City State/Province Zip + 4/Mail Code Country

Phone Fax

Supervisor Job Title

Please register me for the MIS Audit Leadership Institute

**Tuition:** \$3395 (\$3495 after August 9)

Check enclosed PERC # .....

**To pay by credit card**, please call Customer Service at 508-879-7999, ext. 501, and have your credit card information ready.

MIS Training Institute accepts the following credit cards:  
VISA, MasterCard, AMEX, Diners Club and Discover.

## Please send me information on:

- In-House Seminars
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- Audit World 2010
- IT Audit & Controls 2010
- MIS Training Weeks
- FREE TransMISsion Online Newsletter
- The MIS Internal Audit Certificate Curriculum
- The MIS IT Audit Certificate Curriculum
- The MIS Sarbanes-Oxley Certificate Curriculum
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 telephone  fax  email, please check the appropriate box. We occasionally allow reputable companies outside the Euromoney Institutional Investor PLC group to contact you with details of products and services that may be of interest to you. If you do not want us to share your information with other reputable companies, please check this box .



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