



AIMSE International  
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**RE: AIMSE Membership 2008**

The Association of Investment Management Sales Executives (AIMSE) is the only professional organisation dedicated to serving the needs of investment management sales, marketing and client service professionals, worldwide. Originally founded in the United States, AIMSE International began in 1988 from which time membership has been growing steadily.

The AIMSE mission is to provide an educational forum. AIMSE fosters high ethical and professional standards among its members regarding representation of investment products and services. The emphasis is on improving skills and enabling members to adapt to the changing needs of the marketplace.

The objectives of AIMSE include providing forums in which to develop the professionalism of members, increase their understanding and knowledge of the market place and gain better understanding of the needs of their clients, along with ongoing development of sales and marketing skills.

AIMSE membership is extremely beneficial for your company, providing the opportunity to interact with peers, practitioners and experienced salespeople, within the investment management industry, along with clients. Membership provides opportunities for you and your colleagues to attend conferences, seminars and workshops relevant to the investment industry.

To apply for AIMSE membership, please complete the attached application form and fax it back on +44 0(20) 7357 0124 or return to the address shown. As ever, AIMSE's success relies on the support of our members. This is especially true as our industry should continue to evolve rapidly in response to our clients' needs. We look forward to welcoming you as an AIMSE member in 2008.

Yours sincerely,

A handwritten signature in black ink, appearing to read "John Gee Grant". The signature is fluid and cursive, with a large loop at the end of the last name.

John Gee Grant  
International Director AIMSE  
Direct line 020 7743 2121  
Direct fax 020 7743 1092  
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**1**

The only organisation for investment management marketing, sales and client service people

**3**

Indispensable networking with other AIMSE members

**2**

Tailored seminars, workshops and conferences for you and your colleagues at preferential rates

**4**

Up-to-the-minute information about industry developments

## 10 REASONS TO BECOME AN AIMSE MEMBER

**5**

Opportunity to improve knowledge and understanding of the marketplace

**6**

Opportunity to apply for the AIMSE/IPE Wharton Scholarship

**7**

Develop and refine sales and marketing skills

**10**

Access to speakers' documents, even if you didn't attend the event

**9**

Increased awareness of professional standards

**8**

Interact with peers, veteran salespeople, consultants and clients



# ANNUAL MEMBERSHIP APPLICATION FORM

**Membership is exclusively available to corporations in the investment management sales, marketing and client service industry. Membership provides opportunities for you and your colleagues to attend conferences, seminars and workshops relevant to the industry at preferential rates. If your organisation would like to become AIMSE members please complete this application form and fax back on +44 (0)20 7357 0124.**

**Contact details**

(Please complete in BLOCK capitals using black ink)

(Mr/Mrs/Miss/Ms)

Name

Position

Company

Address

City

Post Code

Country

Telephone

Fax

Email

The Corporate Membership fee is £525.00 plus VAT (£616.88). Membership lasts for one year but if you would like your membership renewed automatically at the end of the year please tick the box below.

Automatic membership renewal

Fees for conferences/workshops/seminars are in addition to the membership fee but are discounted for members.

Enclosed is my cheque for £..... payable to AIMSE International.

Please send me an invoice

I wish to pay by credit card, my details are:

Card Number:

Expiry Date:

Please note we do not accept Diners Card and a 3.5% administrative fee will be added to all credit card payments.

Signature: \_\_\_\_\_

**Include details of any colleagues we should add to our mailing list.**

Membership runs from 1st January 2008 until 31st December 2008

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## KEY ANNUAL EVENTS

EVENT	MONTH	LOCATION	DURATION
Consultant Conference	21 February 2008	London	Half day
Roundtable	May	London	Evening
Business Development Seminar	June	London	Half day
Negotiation Skills Course	September	Residential Surrey	Two days
Annual Conference	October	London	Half day
Roundtable	November	London	Evening
European Conference	November	Germany	Half day





## EVENTS IN 2007

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### **AIMSE CONSULTANTS CONFERENCE:**

#### **27 February London - New Models New Channels**

A half day conference discussing fiduciary mandates and whether they are growing in popularity in the Netherlands, followed by a session on the buy-out market. With a flood of new entrants in the market reduced pricing, raised competition and increased innovation has increased the profile. New products and new models in de-risking are emerging to help trustees and sponsors achieve their risk objectives. The day closed with a networking opportunity with key consultants in the industry.

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### **AIMSE ADVANCED NEGOTIATIONS SKILL WORKSHOP:**

#### **3-5 September**

The objective of this course is to improve delegates negotiation skills based on an eight step approach. The course is very much interactive with case studies and role playing and the delegates learn from watching, listening and taking part. Some comments from this year's delegates – *"I was thoroughly surprised at how hands-on and practical the instructors made it."* *"The course had maximum time spent on practical application. I would highly recommend this course to anyone who deals with clients – both internal and external and it would be just as valuable in marketing/sales/consultant relations types of roles."* There are limited places so delegates get the most out of the course.

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### **AIMSE BUSINESS DEVELOPMENT SEMINAR:**

#### **13 September London - Keeping pace with an ever-changing market**

A half day seminar specifically aimed at those in sales, marketing and client service with up to five years' experience. This seminar programme was put together by a group who are in the development stages of their careers. The programme opened with a look at career development within the asset management industry, focussing on the changing landscape of needs and skills. Integral to the process are the RFP team. A close look at how this process is actually used by clients and consultants sparked a lively debate. Some research into current market trends, product developments and new asset classes linked into a session on using research from the market to predict the trend for the next five years. The afternoon closed with a lively 'hot tabling' session, with over twelve consultants facing questions on a wide-range of topics.

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### **EUROPEAN CONFERENCE:**

#### **14 November 2007 Frankfurt Germany**

Dr Karin Schambach of Indigo-Headhunters was the keynote speaker and she spoke about the performance culture in asset management. This was followed by a panel of former consultants discussing their new lives as asset managers or investors and the challenges of reconciling the different job profiles. The final session considered what creates performance culture and its impact on performance, idea generation and the retention and attraction of talents.

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### **AIMSE ANNUAL CONFERENCE:**

#### **3 December London - Solutions for a changing landscape**

A full days conference with speakers from within various sides of the consultant community. The day starts with how fiduciary management is likely to develop within the UK market; this will lead into implemented consulting and its role. Research by the Management Consultants McKinsey & Co suggests that half the asset managers will have vanished by 2015. A look at where the latest thinking is emanating from by the Finnish Pension Alliance, followed by a session on the topical issue of Behavioural Finance, with insights into irrational minds and markets. A session on manager research and how models need to evolve and how asset managers need to develop ends the presentations. A drinks reception with attendance by many of the leading investment consultants and some UK pension funds closes the day.

