



AIMSE

ASSOCIATION OF INVESTMENT MANAGEMENT SALES EXECUTIVES

ENGAGE

GROW

SUCCEED

MEMBERSHIP
INFORMATION



About AIMSE

The Association of Investment Management Sales Executives (AIMSE) is the only professional organization dedicated to serving the needs of investment management sales and marketing professionals. Founded in 1977 with a total of 125 members, AIMSE today has more than 900 members, each with access to a wide array of AIMSE services.

- AIMSE's U.S. and Canadian members manage in excess of \$12 trillion, U.S., in investment management assets.
- 23 of the top 25 largest managers ranked by U.S. institutional tax-exempt assets under management are AIMSE members.
- AIMSE Europe has members in the UK, Netherlands, Sweden, Denmark, France, Germany, Italy, Switzerland, Spain, Greece and Australia.

AIMSE Mission

The AIMSE mission is to provide an educational forum for those employed in the investment management sales and marketing services profession worldwide. AIMSE fosters high ethical and professional standards among our members regarding representation of investment products and services, with an educational emphasis on improving skills, enabling members to adapt to the changing needs of the marketplace.

Our Objectives

- To foster professionalism of the investment management sales industry.
- To educate membership to improve skills to enable membership to adapt to change in the marketplace.
- To provide information to membership.
- To encourage membership to be more representative of the investment management sales industry.

AIMSE Leadership

2018-2019 Officers

Christopher J. Paoella

President, AIMSE
Invesco

Michael R. Gillis

Vice President, AIMSE
Greystone Managed Investments, Inc

Kurt P. Terrien

Treasurer, AIMSE
Clarkston Capital Partners

Carolyn Patton, CFA

President Emeritus, AIMSE

2018-2019 Board of Directors

Alejandra Argüello

Caspian Capital LP

Gregory Bauer, CFA, CAIA

Parametric Portfolio Associates

Heather Conforto Beatty

First Eagle Investment Management, LLC

Tony Buscemi

Gallatin Capital

Gus Catsavis, CFA

Pinnacle Asset Management, L.P.

Jack Ebenreiter, CFA

Federated Investors, Inc.

Ami Fox

DePrince, Race & Zollo, Inc.

Adam Gerentine

Trinity Street Asset Management

Timothy P. Hill

Q-Emerging Markets Corp.

Tasleem Jamal, CFA

Sprucegrove Investment Management Ltd.

Bart Marchant

GQG Partners

John Mirante, CFA, CPA

BMO Global Asset Management

Matt Pawlak

Dimensional Fund Advisors

Christine Sasse, CFA

AB

Kerra Smith

Forester Capital

Rodrigo Soto

Eaton Vance Management

Miriam Tai, CFA, CAIA

Franklin Templeton Investments

Derek Tubbs

CornerCap Investment Counsel

Kimberley Woolverton, CFA

Foyston, Gordon & Payne Inc.

Keith Wosneski

Mackenzie Investments

ENGAGE



Network with colleagues, investment professionals and mentors in collegial environs. With membership across 1000 finance professionals, AIMSE allows dialogues for educational purposes, knowledge sharing, professional development, advancement and visibility. Engagement at national and regional events will foster communication and offer palpable opportunities to enhance your business development efforts.

Upcoming Conferences

AIMSE 2018 Fall Conference

October 10-11, 2018

The Westin New York at Times Square
New York, NY

AIMSE 26th Annual Canadian Conference

January 16-17, 2019

Intercontinental Toronto Centre
Toronto, ON, Canada

AIMSE 42nd Annual Marketing & Sales Conference

April 28-30, 2019

Arizona Biltmore
Phoenix, AZ

Regional Events

Visit the AIMSE Website at:

www.aimse.org/engage/regional.cfm

for upcoming regional events.

GROW

The asset management community operates in an ever-changing challenging global landscape and is no longer a simple business. Through membership with AIMSE, you can gain access to industry wide contacts and key market trends impacting plan sponsors, consultants, third party sales channels and investment product to positively affect revenue growth, while expanding your contact base.



- **AIMSE Resource Library**
- **AIMSE Partners**



SUCCEED



Competition across traditional or alternative segments will become even fiercer and investment professionals will need to be increasingly strategic in their efforts to build relationships. Whether you are seeking a mentor for a specific opportunity or seeking the rewards of imparting your knowledge

as a mentor, AIMSE offers a vibrant community to interact and discuss pertinent information. Best Practices across the industry are shared and partnerships are forged to allow for future successes.

- **Newsletters**
- **Mentorship Program**





Please check one of the following options: **New** **Renew**

Membership Type

Active Membership | \$350

AIMSE Active Membership is open ONLY to those who devote all or a major portion of their time to the marketing or selling of investment management products/services. Membership is by individual only.

Associate Membership | \$450

AIMSE Associate Membership is open ONLY to those who are regularly engaged in and devote a significant portion of his/her time to business activities directly relating to or involving the provision of goods and educational information and services to further enhance and promote the profession of investment management marketing and sales. Membership is by individual only.

NOTE: In the case where a company will be exhibiting at the current year AIMSE Annual Conference, the Exhibitor's Fee entitles four members of the exhibiting company to become Associate Members for that year only. The Associate Member has no voting rights and the number of Associate Memberships is limited. Consultants, representatives of executive search firms, and members of the "working press" are not eligible for AIMSE Membership.

Membership is based upon the calendar year and expires 12/31 annually.

Demographic Information:

For what type of investment management firm do you currently work?

- Traditional Alternative
- Combination Other (please describe):

What is your investor channel focus?

- Public Corporate
- Taft Hartley Consultant
- Combination Endowment/Foundation
- Other (please describe):

What is your firm AUM?

- \$1-\$500 mm \$500mm-\$1bn
- \$1bn-\$10bn \$10bn-\$50bn
- \$50bn-\$100bn \$100bn+

Please tell us more about your responsibilities:
(check all that apply)

- Director or Head of Group
- Direct Sales Client Service
- Consultant Relations
- Other (please describe):

Please list any professional designations:
(check all that apply)

- CFA CAIA MBA
- Other (please describe):

Committee Opportunities:

If you are interested in helping to shape your organization and further the mission of AIMSE, please become a part of one of the AIMSE committees in need of volunteers. Please indicate below the committee(s) on which you would be willing to serve and the committee chair will contact you about opportunities to participate.

- Alternatives Committee
- Canadian Committee
- Communications Committee
- Education Committee
- Membership Committee
- Fall Conference Committee
- Annual Conference Committee
- Regional Events Committee
- Areas of Expertise (please list):

AIMSE Mentorship Program:

In order to facilitate the merging of experienced members with those new to the industry or changing positions, AIMSE is offering a mentorship program. If you would like a qualified AIMSE member to share his/her insight on the industry, please indicate by checking the appropriate box. If you would like to serve as a mentor to a fellow AIMSE member, please indicate by checking the appropriate box. This is a program that involves time commitment on both ends and will require the mentee to drive communication between the mentor and mentee. After your membership form has been processed, you will be sent a questionnaire so that we can properly place you with a mentor or a mentee.

- I would like to have an AIMSE mentor contact me**
- I would like to be an AIMSE mentor**

AIMSE

11130 Sunrise Valley Drive | Suite 350 | Reston, Virginia 20191
703.234.4098 | Fax 703.435.4390 | www.aimse.org



 PREFIX FIRST NAME MIDDLE NAME LAST NAME

 BADGE NAME

 JOB TITLE COMPANY NAME

 MAILING ADDRESS

 CITY STATE ZIP CODE COUNTRY

 TELEPHONE FAX

 EMAIL

Payment Info

Remittance Accepted ONLY in US Currency

- Enclosed is my check, payable to AIMSE
- Please charge my membership dues to:
 - Visa MasterCard American Express

 CARD NO. EXP DATE CVC

 NAME ON CARD

 SIGNATURE

Send To

Please Complete and Send to:

AIMSE
11130 Sunrise Valley Drive | Suite 350
Reston, VA 20191

Fax: 703.435.4390 | OR | Email: info@aimse.org