



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

2017-2018 Officers

Carolyn Patton, CFA

President, AIMSE
First State Investments

Christopher Paoella

Vice President, AIMSE
Liquid Strategies, LLC

Michael R. Gillis

Treasurer, AIMSE
Greystone Managed Investments, Inc.

Christopher D. Rae

President Emeritus, AIMSE
Elevation Marketing Advisory

2017-2018 Board of Directors

Alejandra Argüello

Caspian Capital LP

Gregory Bauer, CFA, CAIA

Parametric Portfolio Associates

Heather Conforto Beatty

First Eagle Investment Management, LLC

Gus Catsavis, CFA

Pinnacle Asset Management, L.P.

Brian Crowell, CFA

Millennium Management LLC

Jack Ebenreiter, CFA

Federated Investors, Inc.

Adam Gerentine

Trinity Street Asset Management

Timothy P. Hill

Q-Emerging Markets Corp.

Tasleem Jamal, CFA

Sprucegrove Investment Management Ltd.

Kevin A. Joy

Weitz Investment Management

John Mirante, CFA, CPA

BMO Global Asset Management

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Proprietary Capital, LLC

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AB

Rodrigo Soto

Eaton Vance Management

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Franklin Templeton Investments

Kurt P. Terrien

Clarkston Capital Partners

Holly Verdeyen

Russell Investments

Greg Weissman

Putnam Investments

Kimberley Woolverton, CFA

Aberdeen Standard 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.

2017-2018 Conferences

AIMSE 2017 Fall Conference

October 11-12, 2017
The Princeton Club
New York, NY

AIMSE 25th Annual Canadian Conference

January 17-18, 2018
Intercontinental Toronto Centre
Toronto, ON, Canada

AIMSE 41st Annual Marketing & Sales Conference

April 29 - May 1, 2018
National Doral Miami
Miami, FL

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.



- **CFA Institute**
- **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**
- **Discussion Forum**
- **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

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 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