



ASSOCIATION OF INVESTMENT MANAGEMENT SALES EXECUTIVES

CORPORATE
SPONSOR
PROGRAM

2017-2018
Opportunities

ENGAGE

GROW

SUCCEED



Table of Contents

**About
AIMSE 2**

**AIMSE
Leadership 3**

**Membership
Demographics 4**

**Corporate
Sponsor
Program 4**

**Summary
of Benefits 6**

**2017-2018
Conference
Schedule 7**

**Corporate
Sponsor Form 8**

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, 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.

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
Four Corners Global Emerging Markets

Tasleem Jamal, CFA
Sprucegrove Investment Management Ltd.

Kevin A. Joy
Weitz Investment Management

John Mirante, CFA, CPA
BMO Global Asset Management

Mark Robertson
Proprietary Capital, LLC

Christine Sasse, CFA
AB

Rodrigo Soto
Eaton Vance Management

Miriam Tai, CFA, CAIA

Kurt P. Terrien
Clarkston Capital Partners

Holly Verdeyen
Russell Investments

Greg Weissman
Putnam Investments

Kimberley Woolverton, CFA
Aberdeen Asset Management

ENGAGE

Corporate Sponsor Program

AIMSE recognizes that the support of our sponsors is critical to the success of our organization. We have created a Corporate Sponsor Program that offers a variety of opportunities to enhance your participation at our conferences and to provide promotional exposure throughout the year with AIMSE members. This sponsorship program is your opportunity to become a partner with AIMSE.

Membership Demographics

Positions at Respective Firms: Partners, Managing Directors, Vice Presidents, Associates

Responsibilities: Sales/Marketing, Investor Relations, Consultant Relations, Global Heads of Distribution

Types of Investment Firms: Traditional: Long-only Equity & Fixed Income
Alternative: Hedge Funds, Fund of Hedge Funds, Real Estate

PLATINUM SPONSOR \$29,000

37% savings! Please refer to page 6 for estimated value of included benefits

As an **AIMSE PLATINUM Sponsor** you will receive the following benefits:

- One complimentary exhibit booth at **EACH** of the following AIMSE conferences:
 - **Annual Marketing & Sales Conference**
 - **Fall Conference**
 - **Canadian Conference**
- Welcome Reception at the Annual Conference
- Prominent exposure of corporate logo in all promotional literature for each conference
- Splash Screen advertisement within AIMSE Mobile App
- Highlighted Exhibitor within AIMSE Mobile App
- Full page advertisement in the final program book for each conference
- Pre- and Post-conference attendee roster
- Four complimentary guest passes to each conference
- AIMSE Associate Memberships for booth representatives for one year (*maximum of 8*)
- Prominent signage at each conference
- Company introduction at opening address
- Opportunity to work with the AIMSE Vendor Relations Committee to produce a co-branded webinar for the membership

GOLD SPONSOR \$24,000

Estimated savings of 25-30% based on conference selection! Please refer to page 6 for estimated value of included benefits

As an **AIMSE GOLD Sponsor** you will receive the following benefits:

- One complimentary exhibit booth at **TWO** of the following AIMSE conferences:
 - **Annual Marketing & Sales Conference**
 - **Fall Conference**
 - **Canadian Conference**
- Prominent exposure of corporate logo in all promotional literature for each conference as well as year-round listing on the AIMSE website
- Full page advertisement in the final program book for each conference
- Main Banner advertisement within AIMSE Mobile App
- Highlighted Exhibitor within AIMSE Mobile App
- Pre- and Post-conference attendee roster
- Three complimentary guest passes to each conference
- AIMSE Associate Memberships for booth representatives for one year (*maximum of 6*)
- Prominent signage at each conference
- Company introduction at opening address
- Opportunity to work with the AIMSE Vendor Relations Committee to produce a co-branded webinar for the membership

SILVER SPONSOR \$18,500

Estimated savings of 35-40% based on conference selection! Please refer to page 6 for estimated value of included benefits


As an **AIMSE SILVER Sponsor** you will receive the following benefits:

- One complimentary exhibit booth at **TWO** of the following AIMSE conferences:
 - **Annual Marketing & Sales Conference**
 - **Fall Conference**
 - **Canadian Conference**
- Prominent exposure of corporate logo in all promotional literature for each conference, as well as year-round listing on the AIMSE website
- Half page advertisement in the final program book for each conference
- Pre- and Post-conference attendee roster
- Two complimentary guest passes to each of the conferences
- AIMSE Associate Memberships for booth representatives for one year (*maximum of 6*)
- Prominent signage at each conference
- Company introduction at opening address
- Main Banner advertisement within AIMSE Mobile App
- Highlighted Exhibitor within AIMSE Mobile App
- Opportunity to work with the AIMSE Vendor Relations Committee to produce a co-branded webinar for the membership

Summary of Benefits

Corporate Sponsor Benefit	Value
Booth at Annual Conference	\$ 8,750
Booth at Fall Conference	\$ 5,500
Booth at Canadian Conference	\$ 3,500
Year-Round Listing on the AIMSE Website	\$ 2,000
Full Page ad in the Conference Programs	\$ 1,500
Half Page ad in the Conference Programs	\$ 850
Pre and Post Conference Attendee Lists	✓
Guest Passes to the Annual Conference	\$ 1,795
Guest Passes to the Fall Conference	\$ 1,295
Guest Passes to the Canadian Conference	\$ 695
Signage at the Conferences	✓
AIMSE Associate Memberships for One Year	\$ 450 <i>per member</i>
Splash Screen on Mobile App	\$ 2,500
Main Banner Ad on Mobile App	\$ 1,500
Highlighted Exhibitor on Mobile App	\$ 1,000
Webinar	\$ 2,500

✓ = INCLUDED

 Please refer to pages 4-5 for the specific components of each Corporate Sponsor Package.

GROW

2017-2018 Conference Schedule



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



25th Annual Canadian Conference
January 17-18, 2018
Intercontinental Toronto Centre | Toronto, ON, Canada



41st Annual Marketing & Sales Conference
April 29 - May 1, 2018
National Doral Miami | Miami, FL



Corporate Sponsor Form

Select Sponsorship Level

- PLATINUM SPONSOR | \$29,000
- GOLD SPONSOR | \$24,000
- SILVER SPONSOR | \$18,500

NAME OF COMPANY *(please print clearly)*

ADDRESS

CITY STATE ZIP

PHONE FAX

EMAIL

NAME OF CONTACT PERSON

Total Payment \$ _____



Method of Payment *(Payments MUST be made in US Dollars)*

- Check enclosed *(payable to AIMSE)*
- Credit card *(please charge)*
 - MasterCard
 - Visa
 - American Express

CARD NUMBER EXP DATE CVC

SIGNATURE

Send To

Please Complete and Send to:

Katie Earley, Program Manager

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

Fax: 703.435.4390 | OR | kearley@drohanmgmt.com