



22nd Annual AIMSE **Canadian** Conference

January 21-22, 2015

Intercontinental Toronto Centre | Toronto, Ontario

Exhibitor and Sponsorship Prospectus

Sponsorship & Exhibitor Opportunities

What are the Benefits?

Our conference is the only opportunity to meet this very targeted group of professionals on a one-to-one basis. As an exhibitor and/or sponsor, you can look forward to these benefits:

- Intimate access with your most valued clients and prospects. Participants come to Toronto from across North America and you can meet with this geographically diverse group by traveling to only one city,
- Complimentary conference registrations (number determined by level of commitment),
- Complimentary Associate Membership in AIMSE,
- An electronic file of the pre-registered attendee roster on January 12, 2015 and a final attendee roster post-conference,
- Recognition and listing in the final conference program including a description of your firm, logo, and contact information,
- Networking opportunities in the exhibit area, including breakfast and refreshment breaks,
- Year-round listing on the AIMSE website, and
- An opportunity to introduce your firm following conference welcome remarks.

Are you interested in exhibiting at multiple AIMSE conferences throughout the year? We encourage you to become an AIMSE Corporate Sponsor!

We have created a Corporate Sponsor Program that offers a variety of opportunities to enhance your participation at our conferences and provides promotional exposure throughout the year. This sponsorship program is your opportunity to become a partner with AIMSE and increase your engagement with AIMSE members.

Silver, Gold, and Platinum-level corporate sponsor packages are available. Each package includes a variety of benefits valued at over \$45k. Contact the AIMSE office to determine which package is right for you!

You're in Good Company!
Silver Sponsors

Callan



Sponsorship & Exhibitor Fees

Lead Sponsor \$10,000 USD **(\$11,162 CAD)**

As **Lead Sponsor** your firm will have the opportunity to join the Conference Chair in welcoming participants to the 22nd Annual AIMSE Canadian Conference.

The Lead Sponsorship Includes:

- Two Complimentary Registrations
(additional registrations are available for \$350 USD)
- Complimentary Exhibitor Booth
- Prominent Signage
- Full Page Ad in the Conference Program
- Acknowledgement in All Conference Promotional Materials
- Acknowledgement by Conference Chair Throughout the Event

Reception Sponsor \$5,000 USD **(\$5,582 CAD)**

Sponsorship of Reception Includes:

- One Complimentary Registration
(additional registrations are available for \$350 USD)
- On-Site Signage
- Shared Ad Space in the Conference Program
- Acknowledgement by Conference Chair Throughout the Event

If you have any questions regarding sponsorship, please contact:

Katie Earley
703.234.4131
fax 703.435.4390
e-mail: kearley@drohanmgmt.com

Exhibitors \$3,500 USD **(\$3,907 CAD)**

Exhibitors are entitled to set-up a 8' x 10' tabletop display. You will be supplied with table, chairs, and electrical hook-ups.

Exhibitors Receive:

- Two Complimentary Registrations
(additional registrations are available for \$350 USD)
- Tabletop Exhibit
- On-Site Signage
- Shared Ad Space in the Conference Program
- Acknowledgement by Conference Chair Throughout the Event

Breakfast Sponsorship \$2,000 USD **(\$2,233 CAD)**

Sponsorship of Breakfast Includes:

- One Complimentary Registration
(additional registrations are available for \$350 USD)
- On-Site Signage
- Shared Ad Space in the Conference Program
- Acknowledgement by Conference Chair Throughout the Event

Nutritional Break(s) Sponsorship **\$1,000 USD (\$1,116 CAD) x 2**

(Sponsorship may be for one or both breaks)

Sponsorship of the Nutritional Break(s)

Includes:

- One Complimentary Registration
(additional registrations are available for \$350 USD)
- On-Site Signage
- Shared Ad Space in the Conference Program
- Acknowledgement by Conference Chair Throughout the Event

How to Reserve Your Space

The enclosed space application and contract should be completed and returned to the AIMSE office with your payment, in accordance with the rules and regulations in the contract. No space is assigned until the contract and full payment are received by AIMSE. Do not send in your contract unless you have enclosed full payment. All fees are to be paid in US currency. Please list any competing companies on the contract that you would prefer not to be located near. Due to the fact that most exhibitors are competitors, it may be impossible to honour all requests. AIMSE makes all space assignments and has the final say in all assignments. AIMSE reserves the right to modify the designated exhibit space in the event a change is necessary. *Table assignments are made on a first come, first served basis.*

NOTE: Please read carefully the exhibit rules and regulations that are part of the application for space. It is important that the representatives from your company whom attend the conference are aware of the terms and conditions as well as the general information that affect the operation of the conference and exposition.

Exhibit Staff

Exhibitors must have a representative available to cover their table throughout the conference. The \$3,500.00 USD exhibit fee entitles each exhibitor to have two (2) representatives attend the conference. Additional company representatives must be members of AIMSE and register for the conference at the discounted group registration fee.

AIMSE does not issue media passes to any conference or event and does not allow members of the "working press" to attend the AIMSE Canadian Conference since it is an educational meeting, not a "media event." Reporters are not eligible or invited to attend.

Registration Information

All exhibitors attending the Conference must complete and return conference registration forms to receive conference materials and name badges.

Associate Memberships

Two (2) representatives that attend the conference to cover your table will be considered AIMSE Associate Members for one year.

Additional Staff Who Wish to Attend

Additional staff members wishing to attend the conference must pay the discounted registration fee of \$350 USD. These individuals must be current AIMSE members.

Active vs. Associate Membership

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.

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 profession of investment management marketing and sales. Membership is by individual only. Consultants are not eligible for membership in AIMSE.



Location

Intercontinental Toronto Centre
Toronto, Ontario

Exhibit Show Date

Thursday, January 22, 2015

Set-up

Thursday, January 22, 7:00 am - 8:00 am.
All exhibit installations must be completed by 8:00 am.

Tear-down

Thursday, January 22, 5:00 pm.
Materials must be removed by 5:00 pm.

Exhibit Hours

Thursday, January 22, 8:00 am - 5:00 pm.

Customs & Shipping

AIMSE has made arrangements with Mendelssohn Event Logistics as the official Customs Broker for this conference.

Booth Description

Exhibit space is 8' x 10', pop-up displays are optional. Furnishings provided: One 6' draped table, two chairs, one wastebasket, one electrical outlet, and one 11" x 13.5" ID sign.

All other items MUST BE ORDERED IN ADVANCE and paid directly to the hotel.

Hotel Reservations

Exhibitors must book their own hotel reservations by December 29, 2014 at 5:00 pm local time at the hotel. No hotel reservations will be made through the AIMSE office.

To reserve a room, call the Intercontinental Toronto Centre at (416) 597-1400 and be sure to state that you are with the AIMSE/2015 Canadian Conference to receive the group rate.

Private Parties/Hospitality Suites

It is against AIMSE policy for any company, organization or individual to conduct private parties, lunches, dinners or hospitality suites during the dates or times of the AIMSE Canadian Conference.

Attendee Roster

AIMSE will email a list of attendees to each exhibitor contact on January 12, 2015. A final list of attendees will be provided post-conference.

The attendee roster is for informational purposes only. It is against AIMSE policy for exhibiting/sponsoring companies to utilize the information included on the attendee roster to conduct mass phone, e-mail, or mail communication with AIMSE members and conference attendees.

AIMSE Staff

If you have any questions regarding exhibiting, please contact Katie Earley at 703.234.4131; fax 703.435.4390; e-mail: kearley@drohanmgmt.com

AIMSE Mission

The AIMSE mission is to provide an educational forum for those employed in the institutional 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 and enabling members to adapt to the changing needs of the marketplace.

Media Guidelines Policy

AIMSE conference registration materials clearly state that executive recruiters, consultants and members of the “working press” are not eligible for AIMSE membership and therefore ineligible to attend AIMSE conferences. AIMSE conferences are not media events and therefore the organization does not issue media passes to any conference or event. AIMSE does recognize investment trade publications as useful tools to the investment management sales and marketing services profession and encourages participation by such organizations as associate members. In accordance with this stated policy, associate AIMSE members of these investment trade publications must comply with the statements of the policy to remain in good standing as members.

AIMSE conferences are off-the-record, to enable members and panelists to speak more candidly than they may when their comments might end up in print, possibly with their organizational affiliation listed as well. The presence of the press could impede open discussion during these educational sessions. AIMSE members, as well as guest speakers, have expressed this concern. The free exchange of ideas is a vital part of AIMSE. The attendance of “working press” could have a dampening effect on open discussion.

Members of the media are, of course, free to interview participants outside of AIMSE conference sessions, as long as they clearly identify themselves and indicate that the participant may be quoted in print.

Discussions occurring in AIMSE conference sessions are off-the-record out of respect for personal and corporate policies over public attribution. It is up to each attendee and/or speaker whether he or she wishes (his or her own) statements made in the course of a session to be quoted in the media.

In the course of the customary self-introductions at the outset of each conference session, the moderator will ask if any such person is in attendance, and if so, out of fairness, will insist on compliance with the off-the-record rule.

For more information, please feel free to contact:

Scott J. Kearney

F-Squared Investments
AIMSE President
781.772.2366
skearney@f2inv.com

Kathy Hoskins

Executive Director
703.234.4130
khoskins@drohanmgmt.com

AIMSE Media Guideline Policy Agreement

I hereby certify that I, _____, *(name of exhibit representative)*
representing _____, *(name of exhibiting company)* have
read and agree to the AIMSE Media Guideline Policy. I will distribute this policy to
_____ *(name of exhibiting company)* colleagues attending the AIMSE
conference and will make certain that all company representatives adhere to
this policy while attending the conference.

Signature _____ Date _____

Exhibitor Contract

Complete all of the following information as you wish it to appear in AIMSE promotional materials:

Company _____

Address _____

City/State/Zip _____

Phone _____ Fax _____

Email _____

Name of Contact Person _____

Exhibit Staff Personnel | Names for Badges

1. Name _____ Job Title _____

Phone Number _____ E-Mail _____

2. Name _____ Job Title _____

Phone Number _____ E-Mail _____

By submitting this Exhibit Space Application and Contract, the above-named
company requests space in the exposition to be held January 22, 2015 at
the Intercontinental Toronto Centre.

We agree to pay AIMSE for said space in accordance with terms and conditions outlined
herein, and understand that, once accepted by AIMSE, this document, including the Rules and
Regulations printed on the back hereof, constitute a valid and binding contract between AIMSE
and us. We agree to comply with all instructions, rules, and regulations as set out herein.

Exhibitor Forms

I, the duly authorized representative of the above-named company, on behalf of said company, subscribe and agree to all the terms, conditions authorizations and covenants contained in this Exhibit Space.

Application and Contract and the Rules and Regulations set out hereof.
I enclose the amount of **\$3,500 USD per space**. I understand that AIMSE will not accept deposits or partial payments. **AIMSE must receive full payment by no later than 7 business days prior to the start of the conference.**

Authorized Signature: _____ Date: _____

Please list any competing companies that may participate whose booth you'd prefer not to be adjacent to: _____

(NOTE: Due to the fact that most exhibitors are competitors, it may be impossible to honour all requests. AIMSE makes all space assignments and will have final say in all space assignments.)

Payment Information

Number of tabletop exhibits _____

I have enclosed the amount of **\$3,500 USD** per 8' x 10' tabletop exhibit.
I understand that AIMSE will not accept deposits or partial payments.

Enclosed is my **cheque**, payable to AIMSE (*Remittance accepted ONLY in US currency*)

Please **charge** payment to: VISA MasterCard American Express

Card Number: _____ Expires: _____

Name on Card: _____ Signature: _____

Return with payment to:

Katie Earley, Program Manager
AIMSE
12100 Sunset Hills Road | Suite 130 | Reston, VA 20190

FAX: 703.435.4390

EMAIL: kearley@drohanmgmt.com

Sponsorship Forms

Sponsorship Opportunities

Sponsorship Contact Information

Complete all of the following information as you wish it to appear in AIMSE promotional materials:

Company _____

Address _____

City/State/Zip _____

Phone _____ Fax _____

Email _____

Name of Contact Person _____

- Yes!** We would like to sponsor the AIMSE Canadian Conference activities checked below:
- Lead Sponsor \$10,000 USD** **Reception Sponsor \$5,000 USD**
 - Breakfast Sponsor \$1,500 USD** **Nutritional Break Sponsor (2) \$1,000 USD** each

We are pleased to commit a total of \$ _____

AIMSE must receive full payment by no later than 7 business days prior to the start of the conference.

Payment Information

Enclosed is my **cheque**, payable to AIMSE (*Remittance accepted ONLY in US currency*)

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FAX: 703.435.4390

EMAIL: kearley@drohanmgmt.com

Rules and Regulations

PAYMENT AND CANCELLATION OF EXHIBIT SPACE

Applications will not be processed without the required payment. If Exhibitor has made payment and notifies AIMSE 30 days prior to the opening of the Conference that it will be unable to exhibit for any reason, AIMSE will attempt to lease the space to another Exhibitor. If AIMSE is successful in leasing such previously contracted space and if AIMSE shall have leased and received payment for all exhibit space in the Conference, Exhibitor shall be refunded all monies paid for exhibit space, less \$1,500.00 which shall be retained by AIMSE as liquidated damages. AIMSE reserves the right to cancel any Exhibitor's right to exhibit for any violation of this Contract, any rules or regulations of the conference or for other due cause. In the event AIMSE shall cancel such rights, all monies paid by Exhibitor shall be retained by AIMSE as liquidated damages.

APPLICATIONS FOR ASSIGNMENTS OF EXHIBIT SPACE

AIMSE reserves the right to render interpretations and decisions and to establish further regulations as may be deemed necessary for the general success and well-being of the Conference. AIMSE's decisions and interpretations shall be accepted as final in all cases. AIMSE reserves the right to alter the floor plan to adjust for spaces not sold. AIMSE reserves the right to decline or prohibit any exhibit which in its judgment is out of keeping with the character of the Conference, this reservation being all-inclusive as to persons, things, printed matter, products and conduct. Space will be assigned in the order that fully executed applications, accompanied by the required fee, are received.

No Exhibitor may assign sublet or apportion its space in whole or in part, nor exhibit any products or services other than those manufactured or handled in the normal course of its business and described in the application, nor permit any agent of any non-exhibiting firm to solicit business or take orders in its space. Space will be assigned on a "First Come, First Served" basis and at management discretion.

EXHIBIT LIMITATIONS:

Exhibitors shall not display or place any product, sign, partition, person, apparatus, shelving, or other construction which extends more than 10 feet above the floor or more than 8 feet forward from the back wall of the booth. All signage must be professionally done. Exhibits of a nature that obstruct the view and interfere with privilege of other Exhibitors or, which because of noise or any other reason become objectionable may be required to be modified, moved or removed at the discretion of AIMSE. No interference with the light or view of other Exhibitors will be permitted. No cooking may take place in Exhibitor's space and no food and/or beverage products may be distributed by Exhibitor. No beer, wine or intoxicating liquor may be distributed by any Exhibitor. Exhibitor agrees that AIMSE may take whatever steps may be deemed necessary to control or reduce the noise level in the space so as not to interfere with the conference. Exhibitors shall not provide or permit the playing or reproduction of music in any form or at any time. The only public address system permitted at the conference will be maintained by AIMSE.

GENERAL REGULATIONS:

Interviews, distribution of literature, demonstrations and such will be permitted only within Exhibitor's space. Aisles must be kept clear of exhibit materials and personnel. Debris must be disposed of in building trash containers. No part of the Hotel shall be defaced in any manner nor shall signs, decals, stickers or other articles be posted, nailed or otherwise affixed to any part of the building. The use of flammable substances or decorative materials is prohibited. All decorative fabrics must be flameproof. Exhibitor accepts full responsibility for compliance with all local, state, and Federal safety regulations. Exhibitors are not allowed to conduct activities that could be considered an illegal lottery under the State of New York laws when the event is to be held. The exchange of money or consummating the sale of goods or services on the exhibit floor is prohibited. AIMSE has full power to interpret and enforce all regulations of the show and the power to make amendments and/or the offending Exhibitor at the expense of the Exhibitor. In addition, all Exhibitors agree to be bound by the terms of AIMSE's agreement with facility in which the conference is held. Failure to comply with all applicable rules may also result in forfeiture of all further rights to exhibit at future shows sponsored by AIMSE together with all fees paid. AIMSE may lease any space so forfeited to another Exhibitor and retain all revenues collected.

Rules and Regulations

LIABILITY AND INSURANCE:

Notwithstanding AIMSE's agreement to provide security, all property of the Exhibitor remains under his custody and control in transit to and from hotel, during installation and removal, and while it is within in the confines of the Hotel. Neither AIMSE, its service contractors, the management of the Hotel nor any of the officers, staff members, or directors of any of the same are responsible for the safety of the property of Exhibitors from theft, damage by fire, accident, vandalism or other causes, and the Exhibitor expressly waives and releases any claim or demand he may have against any of them by reason of any damage to or loss of any property of the Exhibitor, except where the damage or loss is due to the gross negligence or willful misconduct of AIMSE, its servants or employees, arising out of AIMSE's duties and responsibilities under the agreement. The Exhibitor expressly releases AIMSE, its directors, officers, agents, employees, and/or servants from any such loss, damage or injury. AIMSE shall not be liable for injury of any type from any cause to persons conducting or otherwise participating in the conduct of the Show or to invitees, guests, or employees of the Exhibitor. Exhibitor understands that AIMSE does not carry business interruption and property damage insurance coverage for loss or damage of Exhibitors property. The Exhibitor agrees to obtain the following insurance during the dates of the trade show, including move-in and move-out days and shall be prepared to furnish a certificate of insurance to AIMSE if requested: Comprehensive general liability insurance coverage including protective and contractual liability coverage of \$250,000/\$500,000 for bodily injury and \$50,000 property damage. AIMSE and the Exhibitor agree to waive the right of subrogation by their insurance carriers to recover loss sustained under the respective insurance contracts for real and personal property. AIMSE, its staff, employees, or agents assume no responsibility or liability whatsoever in matters relating to restrictions imposed on any Exhibitor by any governmental agency. AIMSE's general contracts shall not be liable for failure to perform their obligations under their contract due to strikes, riots, acts of God, or any other cause beyond their control.

HOLD HARMLESS AND INDEMNIFICATION:

This agreement shall not constitute or be considered a partnership, joint venture, or agency relationship between AIMSE Exhibitor or exhibition center. Exhibitor hereby agrees to indemnify, hold harmless and defend AIMSE and the Hotel, and their respective officers, directors, and employees (indemnities) from and against any and all liability, responsibility, loss, damage, cost or expense of any kind whatsoever as they arise (including but not limited to court costs, interest and attorney's fees) which the Indemnities may incur, suffer, be part to, or be required to pay, incident to or arising directly or indirectly from any intentional or negligent act or omission or breach of these terms, conditions, and rules, or violation of any ordinance or statute by Exhibitor or any of its employees, servants or agents. The Exhibitor assumes full responsibility and liability for the actions of its agents, employees, and independent contractors, whether acting within or without the scope of their authority, and agrees to indemnify, hold harmless, and defend the Indemnities as expenses arise, from responsibility or liability resulting directly or indirectly, or jointly, from other causes which arise because of the acts or omission of its agents, employees, relatives, or independent contractors whether acting within or without the scope of their authority.

CANCELLATION OR POSTPONEMENT OF SHOW:

In the event that any unforeseen occurrence shall render the fulfillment of this agreement impossible, the parties shall mutually amend or terminate the agreement at AIMSE's option. The Exhibitor hereby waives any claim against AIMSE for damages or compensation. AIMSE may return a portion of the amount paid for space after deduction of any amounts necessary to cover expenses incurred in connection with the show. Such expenses shall include, but not be limited to all expenses incurred by AIMSE as a result of contracts with third parties for services or products incidental to the show including out of pocket expenses incidental to the show, and all overhead expenses attributable to the production of the show. No moneys will be returned should the dates or the location of the show be changed by AIMSE, but Exhibitor will be assigned space, which the Exhibitor agrees to use under these same results and regulations. AIMSE shall not be financially liable in the event the show is interrupted, canceled, moved, or dates changed except as provided herein. The Exhibitor hereby agrees that the laws of Reston, Virginia shall control the construction and enforceability of this Agreement and hereby consents to the jurisdiction of Reston, Virginia and to the Federal District Courts within the State with respect to any right of action arising under this agreement.

Save the Date! 

AIMSE 38th Annual Marketing & Sales Conference

April 26-28, 2015

Arizona Biltmore Resort & Spa
Phoenix, Arizona

