



**AIMSE**

# ASSOCIATION OF INVESTMENT MANAGEMENT SALES EXECUTIVES

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ENGAGE

GROW

SUCCEED

MEMBERSHIP  
INFORMATION



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## 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 800 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

AIMSE's mission is to provide a worldwide forum for sales and marketing professionals in the investment management industry. We emphasize education, improving skills, and enabling members to adapt to the changing needs of the marketplace. AIMSE fosters high ethical and professional standards regarding the representation of investment strategies and services, and actively promotes diversity and inclusion throughout the investment management industry.

## 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.

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## AIMSE Leadership

### 2019-2020 Officers

**Michael R. Gillis**

President, AIMSE  
TD Greystone Asset Management

**Kurt P. Terrien**

Vice President, AIMSE  
Clarkston Capital Partners

**Miriam Tai, CFA, CAIA**

Treasurer, AIMSE  
Franklin Templeton Investments

**Christopher J. Paoella**

President Emeritus, AIMSE  
Invesco

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### 2019-2020 Board of Directors

**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.

**Sean Clark, CFA**

Westwood Holdings Group, Inc.

**Peter Crivelli**

Carillon Tower Advisers

**Ami Fox**

Artisan Partners, Limited Partnership

**Adam Gerentine**

Trinity Street Asset Management

**Maureen Hays**

Principal Global Investors

**Tasleem Jamal, CFA**

Sprucegrove Investment  
Management Ltd.

**John Mirante, CFA, CPA**

BMO Global Asset Management

**Matt Pawlak**

Dimensional Fund Advisors

**Kerra Smith**

Lawton Park Capital Management, LP

**Mark A. Sullivan**

Bridgeway Capital Management, Inc.

**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 collegiate environs. With membership across 800 finance professionals, AIMSE allows dialogue 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 27th Annual Canadian Conference**

January 15 - 16, 2020

Intercontinental Toronto Centre  
Toronto, ON, Canada

### **AIMSE 2020 Fall Conference**

October 13 - 14, 2020

The Chicago Athletic Association  
Chicago, IL

### **AIMSE 43rd Annual Marketing & Sales Conference**

May 3-5, 2020

Boca Raton Resort & Club  
Boca Raton, FL

## Regional Events

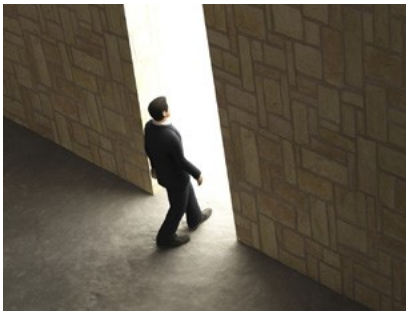
Visit the AIMSE Website at:

[www.aimse.org/engage/regional.cfm](http://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**
- **AIMSE/Toigo Scholarship**



# 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**

