



24th ANNUAL AIMSE **CANADIAN CONFERENCE**

January 18-19, 2017

Intercontinental Toronto Centre Toronto, Ontario

Exhibitor & Sponsorship Prospectus

EMBRACE CHANGE

Sponsor & 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 2, 2017 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!

▶ Platinum Sponsors



▶ Silver Sponsor



Sponsor & Exhibitor Fees



Lead Sponsor

› **\$10,000 USD** | \$13,357 CAD

As Lead Sponsor your firm will have the opportunity to join the Conference Chair in welcoming participants to the 24th Annual AIMSE Canadian Conference.

The Lead Sponsorship Includes:

- Two Complimentary Registrations
(additional registrations are available for \$350 USD)
- Complimentary Tabletop Exhibit
- 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** | \$6,678 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
EMAIL: kearley@drohanmgmt.com

Exhibitors

› **\$3,500 USD** | \$4,675 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** | \$2,671 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 (x2)

› **\$1,000 USD** | \$1,335 CAD

Sponsorship may be for one or both breaks

Sponsorship of a Nutritional Break 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

General Information

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

The two exhibit representatives listed on the Exhibitor Contract will be registered for the conference and receive an AIMSE Associate membership.

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.**

General Information (continued)

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

225 Front Street West
Toronto, Ontario

Exhibit Show Date

Thursday, January 19, 2017

Set-up

Thursday, January 19 | 7:00 am - 8:00 am.

All exhibit installations must be completed by 8:00 am.

Tear-down

Thursday, January 19 | 4:35 pm.

Materials must be removed by 4:35 pm.

Exhibit Hours

Thursday, January 19 | 8:00 am - 4:35 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

24th Annual AIMSE Canadian Conference

General Information (continued)

Hotel Reservations

Exhibitors must book their own hotel reservations by **December 15, 2016** to receive the group rate. No hotel reservations will be made through the AIMSE office.

To reserve a room, call the Intercontinental Toronto Centre at 800.235.4670 and be sure to state that you are with the AIMSE/2017 Canadian Conference to receive the group rate of **\$259 CAD** for a single room. To make your reservation online, visit: <https://aws.passkey.com/go/AIMSE17>.

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 2, 2017**. A final list of attendees will be provided post-conference.

AIMSE provides conference attendee lists for informational purposes only. AIMSE respects our members and conference attendees and must protect the integrity and effectiveness of our organization's messages by minimizing unsolicited, mass-delivered messaging. Exhibiting and sponsoring companies may not utilize conference attendee lists to conduct mass phone, e-mail, or mail communication. This is a non-negotiable AIMSE policy.

» **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

General Information (continued)

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:

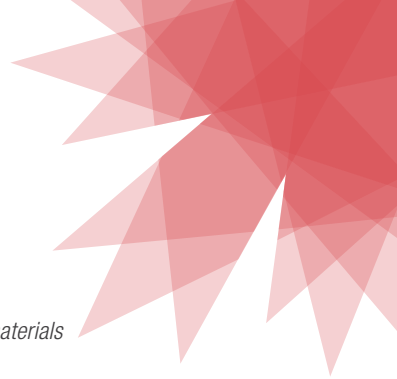
Chris Rae, AIMSE President
Elevation Marketing Advisory
646.468.1841 | chris.rae@elevationsecurities.com

Kathy Hoskins, Executive Director
703.234.4130 | khoskins@drohanmgmt.com



24th Annual AIMSE Canadian Conference

Exhibitor Contract



» Complete information below 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 EMAIL

2. _____
NAME JOB TITLE

PHONE NUMBER EMAIL

» By submitting this Exhibit Space Application and Contract, the above-named company requests space in the exposition to be held January 19, 2017 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.

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 _____

24th Annual AIMSE Canadian Conference

Exhibitor Contract (continued)



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

EXP DATE

NAME ON CARD

SIGNATURE

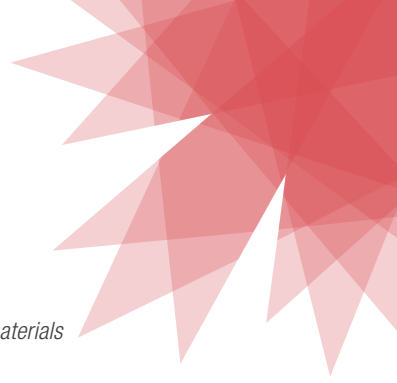
» Return with payment to:

AIMSE | Attn: Katie Earley
11130 Sunrise Valley Drive, Suite 350
Reston, Virginia 20191
FAX: 703.435.4390 | kearley@drohanmgmt.com



24th Annual AIMSE Canadian Conference

Sponsorship Contract



» Complete information below 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:
- | | |
|---|--|
| <input type="checkbox"/> Lead Sponsor \$10,000 USD | <input type="checkbox"/> Reception Sponsor \$5,000 USD |
| <input type="checkbox"/> Breakfast Sponsor \$2,000 USD | <input type="checkbox"/> Nutritional Break Sponsor (2) \$1,000 USD (each) |

» We are please 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*)
- Please **charge** payment to: VISA MasterCard American Express

CARD NUMBER

EXP DATE

NAME ON CARD

SIGNATURE

» Return with payment to:

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Reston, Virginia 20191
FAX: 703.435.4390 | kearley@drohanmgmt.com



24th Annual AIMSE Canadian Conference

Save the Date

AIMSE 40th Annual Marketing & Sales Conference

» April 30 – May 2, 2017

Fairmont Scottsdale Princess | Scottsdale, AZ



AIMSE

11130 Sunrise Valley Drive, Suite 350

Reston, Virginia 20191

703.234.4098 | www.aimse.org