



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 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.

2020-2021 Officers **AIMSE Leadership**

Kurt P. Terrien
President, AIMSE
Clarkston Capital Partners

Miriam Tai, CFA, CAIA
Vice President, AIMSE
Franklin Templeton Investments

Adam Gerentine
Treasurer, AIMSE
Trinity Street Asset Management

Michael R. Gillis
President Emeritus, AIMSE
TD Asset Management

2020-2021 Board of Directors

Gregory Bauer, CFA, CAIA
Parametric Portfolio Associates

Tony Buscemi
Gallatin Capital

Gus Catsavis, CFA
Pinnacle Asset Management, L.P.

Sean Clark
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Peter Crivelli
Carillon Tower Advisers

Lewis Del Ponte
Harvest Volatility Management, LLC

Ami Fox
Artisan Partners, Limited Partnership

Maureen Hays
Principal Global Investors

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Sprucegrove Investment Management Ltd.

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Acuitas Investments, LLC

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BMO Global Asset Management

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Dimensional Fund Advisors

Kerra Smith
Lawton Park Capital Management, LP

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Elevation Marketing Advisory

James Stafford, CFA
Atlanta Capital

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

° @ o 8 ° # #
January 2021

° @ o 44th Annual Marketing & Sales Conference
May 2 - 4, 2021
Fairmont Scottsdale Princess
Scottsdale, AZ

° @ o 2021 Fall Conference
October, 2021

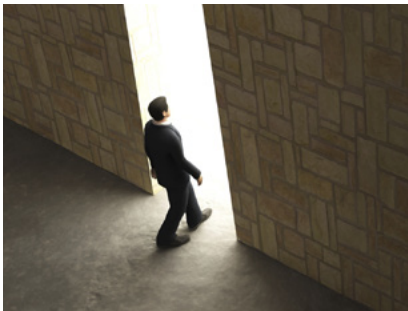
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Visit the AIMSE Website at:
www.aimse.org/engage/events/regional-events/
for upcoming regional events.

Webinars

Visit the AIMSE Website at:
www.aimse.org/engage/aimse-webinars/
for upcoming webinars.

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**

