



**AIMSE**

Dedicated to serving the needs of investment management sales and marketing professionals through knowledge sharing, education, and networking.



# The Association of Investment Management Sales Executives (AIMSE)

# The AIMSE Mentorship Program

- Connects mentors, experienced leaders in investment management sales and marketing and in AIMSE, with mentees, who are experienced professionals new to AIMSE or up-and-coming professionals in the field, for job effectiveness coaching and advice
- Helps AIMSE members share knowledge and ideas and give back to the organization
- Introduces new or less experienced members to the broader professional network and learn how to get involved in AIMSE
- Enables mentors and mentees to bolster their development and build meaningful connections



# Eligibility



## **Mentors should have:**

- 5 years or more professional experience in investment management sales and marketing (Note: If you have less than five years of experience, you can still apply for consideration if you have a specific area of expertise to share.)
- Expertise in any of the following areas: selling, marketing, networking, leadership, communication skills, strategic decision making, presentation and organizational skills
- The ability to provide insights into the profession and the AIMSE organization to help guide the mentee

## **Mentees should:**

- Be new to AIMSE, the industry, or a sales and marketing role
- Have the ability and willingness to commit to a yearlong mentorship
- Desire an improvement of their effectiveness and knowledge of the industry



# Benefits for Mentees

Your AIMSE Mentor will introduce you to the organization, and the education and networking opportunities available. Through this program, mentees will:

- Learn first-hand what it takes to be successful from industry veterans
- Gain real-time marketing and sales knowledge raising the quality of your interactions
- Broaden their professional network among AIMSE membership, as well as consultants and investors, as appropriate
- Have greater insight and access to AIMSE committees and leadership opportunities



# Benefits for Mentors



- Opportunity to give back to their profession by helping others who need support and coaching to succeed in their careers
- Make new connections and friends
- Add mentoring to your own professional development goals
- Be recognized as a leader and volunteer within your profession and AIMSE



# Program Features

- Mentoring program is included in the cost of annual membership - no additional charge
- One-year pairing with an AIMSE member:
  - Selected to meet your needs, with similar firm, coverage and asset attributes,
  - Experienced and senior in the industry
  - Has been an AIMSE member for two or more years and well connected within the AIMSE network





*I've benefitted directly from the AIMSE members I've met through the mentorship program, and the healthy comradery within the industry that AIMSE has fostered. I'd strongly recommend that seasoned industry veterans and those new to the industry consider enlisting as a mentor or mentee. I'm thankful for the insight that my mentor has shared with me and for the industry professionals who have volunteered their time to build such an impactful and highly regarded professional organization within our industry.*

**Anthony Monraz, CAIA**  
Arrowmark Partners



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*I have professionally and personally benefitted from being a mentee in AIMSE's Mentorship Program. My mentor has given me sound advice, and has been helpful in connecting me to others in the investment management community. My network has grown over the year, which, coupled with the various events and programs that AIMSE offers, has allowed me to more effectively engage the institutional investor and consultant communities.*

**Daniel Kettner**  
Vice President, Neuberger Berman



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# Commit to Communicate!

- Develop a regular rhythm to connect monthly with your mentee through video chats or phone calls (we suggest monthly)
- Consistency is key! Stay committed to your regularly scheduled syncs and avoid canceling or rescheduling
- Be open and honest to build trust and shared experiences that will help guide your mentee
- Listen. Let your mentee ask questions to learn more; however, try not to dominate the conversation. Allow time to simply listen, and ask open-ended questions to encourage dialogue
- Avoid distractions during your monthly syncs. Make sure you have each other's undivided attention



# Starting Questions (Ice Breakers)



- What are your goals for our relationship?
- In what areas do you need the most help?
- What barriers are you experiencing?
- How are you getting connected to others in the profession?
- Have you noticed any patterns in how you approach professional situations?
- What has been unexpected in your experience so far?
- What steps are you taking to learn the current trends in the field?
- Describe what has excited you most in this role.
- What does success look like for you?



# Topics for Discussion

Mentors will be provided a “Trending Topic of the Month” to include in monthly sync

## **Timely and Relevant Resources:**

- Sourcing new leads/ prospects in a virtual (COVID) environment.
- Fundraising through drawdowns
  - How have sales professionals navigated these challenges and approached allocators who are holding in a wait-and-see position?
- How can I use the new virtual platforms (zoom, teams, etc.) in an effective sales capacity to highlight my team and our firm?



# Recurring Themes



## **Building and maintaining a professional network**

- How can individuals add value and contribute to their network and professional relationships?

## **A changing landscape: the evolving roles of Sales and Marketing**

- What insights do Mentors have into how the industry has changed over the past 1, 3, 5, 10, 20 years etc.?
- How do Mentors envision the role evolving, and what can Mentees do to best position themselves to be successful in the future?

## **Developing a personal “brand” and style.**

- How do junior sales professionals develop their own style and approach that builds on their individual strength, skillset, and industry best practices?



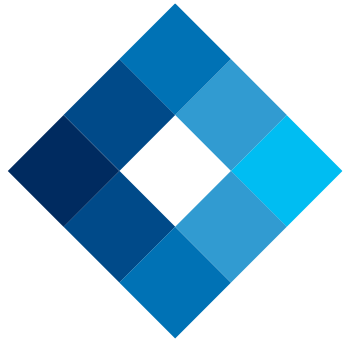
# How do I sign up?

Complete the form: <https://aimse.org/mentorship-program-application/>

Contact the Membership Chairs:  
[tbuscemi@gallatincapital.com](mailto:tbuscemi@gallatincapital.com) or  
[dtubbs@cornercap.com](mailto:dtubbs@cornercap.com)







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**THANK YOU!**