



# AIMSE

The Association of Investment  
Management Sales Executives

A membership organization  
tailored to the needs of  
investment marketing and  
sales executives



## Corporate Sponsor Program

# 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, 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 US** 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



# 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.



# AIMSE Leadership

## 2021–2022 Officers

**Miriam Tai, CFA, CAIA**

President, AIMSE  
Franklin Templeton Investments

**Adam Gerentine**

Vice President, AIMSE  
Trinity Street Asset Management

**Tony Buscemi**

Treasurer, AIMSE  
Gallatin Capital LLC

**Kurt Terrien**

President Emeritus, AIMSE  
Clarkston Capital Partners

## 2021–2022 Board of Directors

**Gregory T. Bauer, CFA, CAIA**

Parametric Portfolio Associates

**Chelsea Carbonel**

Dimensional Fund Advisors

**Gus Catsavis, CFA**

Pinnacle Asset Management, L.P.

**Sean Clark, CFA**

Westwood Management Corp.

**Peter Crivelli**

Carillon Tower Advisers

**Lewis Del Ponte**

Harvest Volatility Management, LLC

**Ami Fox**

Artisan Partners, Limited Partnership

**Claudette Grant**

Capital Group

**Maureen Kennedy Hays**

Principal Global Investors

**Tasleem Jamal, CFA**

Sprucegrove Investment  
Management Ltd.

**Christa Maxwell, CFA, CIPM**

Acuitas Investments, LLC

**Matt Pawlak**

Sands Capital

**Michael Peck**

Invesco Canada Ltd.

**Kerra Smith**

Trinity Street Asset Management

**Mark A. Sullivan**

Elevation Marketing Advisory

**James Stafford, CFA**

Atlanta Capital

**Derek Tubbs**

CornerCap Investment Counsel

**Kimberley Woolverton, CFA**

Foyston, Gordon & Payne, Inc.

**Keith Wosneski**

Mackenzie Investments

# Corporate Sponsor Program

AIMSE recognizes that the support of our sponsors is critical to the success of our organization. We have created a Corporate Sponsor Program that offers a variety of opportunities to enhance your participation at our conferences and to provide promotional exposure throughout the year with AIMSE members. This sponsorship program is your opportunity to become a partner with AIMSE.

## Membership Demographics

### Positions at Respective Firms:

Partners, Managing Directors,  
Vice Presidents, Associates

### Responsibilities:

Sales/Marketing, Investor  
Relations, Consultant  
Relations, Global Heads of  
Distribution

### Types of Investment Firms:

Traditional: Long-only Equity  
& Fixed Income  
Alternative: Hedge Funds,  
Fund of Hedge Funds, Real  
Estate

### Geography:

Primarily US and Canada





# Gold Sponsor – \$30,000

## Pre-event Visibility

- Recognition on the AIMSE website
- Sponsor's logo included in promotional email, including a hyperlink to the sponsor's website, distributed by AIMSE for the event (sent from AIMSE) to all attendees.
- Recognition in one LinkedIn (1k followers) promotion of the event. (created by AIMSE)

## Event Visibility

- Speaking role at Annual Conference, subject to the theme of the conference and allocator availability
- Attendance for six (6) at all three Conferences – Annual, Fall, and Canadian
- Booth at all three events
- Access to all webinar and regional events (excluding capacity-constrained events)



# Silver Sponsor – \$20,000

## Pre-event Visibility

- Recognition on the AIMSE website
- Sponsor's logo included in promotional email, including a hyperlink to the sponsor's website, distributed by AIMSE for the event (sent from AIMSE) to all attendees.
- Recognition in one LinkedIn (1k followers) promotion of the event. (created by AIMSE)

## Event Visibility

- Event sponsorship at the Annual Conference (ie. Golf, Morning Yoga, Tennis, Cornhole, Volleyball, Fun Run, Bocce Ball, Breakfast, or Lunch.)
- Attendance for four (4) at all three Conferences – Annual, Fall, and Canadian
- Booth at all three events
- Access to all webinar and regional events (excluding capacity-constrained events)



# Bronze Sponsor – \$10,000

## Pre-event Visibility

- Recognition on the AIMSE website
- Sponsor's logo included in promotional email, including a hyperlink to the sponsor's website, distributed by AIMSE for the event (sent from AIMSE) to all attendees.

## Event Visibility

- Attendance for two (2) at all three Conferences – Annual, Fall, and Canadian
- Booth at all three events
- Access to five (5) webinar and regional events (excluding capacity-constrained events)





# Affiliate Sponsor – \$5,000

## Event Access

- Attendance for one (1) at all three Conferences – Annual, Fall, and Canadian
- Access to five (5) webinar and regional events (excluding capacity- constrained events)



# Corporate Sponsor Form

\_\_\_\_\_  
Name of company (please print clearly)

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
ZIP

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Fax

\_\_\_\_\_  
Email

\_\_\_\_\_  
Name of contact person

## Select Sponsorship level

- ☐ Gold Sponsor •\$30,000
- ☐ Silver Sponsor •\$20,000
- ☐ Bronze Sponsor •\$10,000
- ☐ Affiliate Sponsor •\$5,000

**Total payment** \_\_\_\_\_

**Method of payment** (Payments MUST be made in US Dollars)

- ☐ Check enclosed (payable to AIMSE)
- ☐ Credit card (please charge)
- ☐ MasterCard    ☐ Visa    ☐ American Express

\_\_\_\_\_  
Card Number

\_\_\_\_\_  
Exp Date

\_\_\_\_\_  
CVC

\_\_\_\_\_  
Signature

**Please Complete and Send to:**

**AIMSE**

11130 Sunrise Valley Drive • Suite 350 • Reston, VA 20191

Fax: 781-658-2664 • Email: [info@aimse.org](mailto:info@aimse.org)

