



AIMSE

The Association of Investment
Management Sales Executives

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



Membership Brochure



Engage

Expand Your
Professional
Network



Grow

Develop Essential
Skills



Succeed

Get information
and intelligence
tailored to your
needs

Who We Are

Mission

AIMSE's mission is to provide a 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

1. To foster professionalism among our investment management sales, marketing, client service, and consultant relations members.
2. To facilitate a networked community among our membership, consultants, investors & allocators through face-to-face and virtual interaction.
3. To provide development opportunities to our members in order to increase effectiveness and insight.

AIMSE's membership averages more than 800 professionals, representing asset managers large and small, including both traditional and alternative investors.



Engage

Expand Your Network

Network with consultants (field, research & leadership), investors (CIOs & research analysts), and hundreds of peers in collegial settings (Annual & Fall Conferences, Regional Networking Events & Webinars).

Access

Our annual conference features a Consultant Round Table where participants can meet, learn about trends and areas of interest, and pose questions to consultants in a small group setting.

Hear from the Investment Community

What strategies and asset classes are of interest NOW and how to communicate your firm and strategy to them most efficiently?

Places for Engagement

- [Annual Conference](#)
- [Fall Conference](#)
- [Regional Events](#)
- [Webinars](#)



Grow

Professional Development

Each conference features speakers who seek to elevate your craft through vision, idea, motivation and key "take-aways" to apply to your everyday.

- "Attention Pays – How to Drive Profitability, Productivity and Accountability for Sales Executives" - Neen James
- "Unconscious Bias - Evidence & Strategies" – Fiona Rawle, PhD
- "The New Marketing Paradigm" - Chris Rae
- "Your stories are more powerful than your data." - Ron Tite
- "Stress less, connect more" - Collette Carlson
- Institutional Investor Trends Briefing – eVestment

Mentorship Program

Whether you are seeking a mentor or seeking the rewards of imparting your knowledge as a mentor, AIMSE offers a mentorship program to foster development and deepen insights.

Boot Camp

Best practices & how to's from across the industry are shared (formal session at the Annual Conference, training materials in the online content library).

AIMSE Learning Opportunities

- Annual Sales & Marketing Conference
- Webinars
- Fall Conference
- Annual Canadian Conference
- Regional Events



Succeed

Connect

There is almost nothing more valuable than a professional network that matches your needs and expectations.

- Advice from professionals who understand the specific challenges you face every day.
- Connection with colleagues who have shared experiences, whose experiences and failures will help you now or in the future.
- Fellow executives who not only help out when you ask for it, but who also reach out proactively because of the bond you share via AIMSE.

Plus, AIMSE membership connects you with these specific benefits to enhance your connection and bring you market intelligence:

- **Membership Directory.** Connect with peers, in your region, your asset class, etc.
- **Content Library.** Consultant/Investor Profiles, Provided Materials.
- **Conference Notes.** Firm overviews from many of the industry's leading consulting firms.
- **Surveys.** (Callan's - "Coping with COVID 19").

The AIMSE Network

- Live Events & Webinars
- Member Directory
- Mentorship Program



AIMSE Network

Representatives from the following allocators and consultants have attended AIMSE events over the past three years.

Consultants

ACG	Gavion
Albourne	Highland Consulting
AndCo.	LCG Associates
Angeles	Marquette Associates
Aon	Meketa
Callan	Mercer
Cambridge	Morningstar
Canterbury Consulting	NEPC
CAPTRUST	Rocaton
Cardinal Investment Advisors	Russell
Cliffwater	RVK
Curcio Webb	Segal Marco Advisors
DeMarche	SEI
FEG	Verus
Fiducient Advisors	WTW
	Wilshire

Allocators

Advocate Healthcare	Helmsley Charitable Trust	Pennsylvania Public School
Alcoa Corporation	Honeywell Capital Management	Employee's Retirement System
Appomattox Advisory	Houston Firefighter's Relief	Perrella Weinberg Partners
Arizona Public Safety Personnel	Retirement Fund	Public Employees Retirement
Retirement System	International Paper	Association of New Mexico
Arizona State Retirement System	Kaleida Health	Rockefeller Capital Management
Boeing	Kentucky Retirement System	Sanofi
California State Teacher's	Maryland State Retirement and	SSM Healthcare
Retirement System	Pension System	St. Jude Children's Hospital
Carelton College	Mercy Health	State of Wyoming
Carnegie Corporation	Missouri Public School & Education	Teacher's Retirement System of
CDPQ	Employee Retirement Systems	Texas
City of Detroit	New York State Common	Texas Municipal Retirement System
Cleveland Clinic Investment Office	Retirement Fund	The Harry and Jeannette Weinberg
DePaul University	Northern Trust	Foundation
Doris Duke Charitable Trust	Novant Health	Trinity Healthcare
Drexel University	NY Presbyterian Hospital	University of Chicago
Hawaii Employee's Retirement	NYC Bureau of Asset Management	University System of Maryland
System	Penn Mutual Asset Management	Unum Group
		US Bank Wealth Management
		Wespeth Investment Management

TOIGO Partnership

AIMSE is proud to partner with The Robert Toigo Foundation since 2017 to promote diversity in the asset management industry. AIMSE embraces Toigo's mission to foster the career advancement and increased leadership of underrepresented talent by creating mechanisms for greater inclusion from the classroom to the boardroom.

On behalf of the AIMSE membership, the Board of Directors established a scholarship program for participants of the Toigo Fellowship program. Currently, we have four AIMSE Toigo Fellow Scholarship Recipients per year. The scholarships provide tuition assistance, paid directly to their respective elite graduate MBA business school. In addition to monetary support, the AIMSE Toigo scholarship recipients are provided full AIMSE memberships and are encouraged to engage in regional events and attend both the AIMSE Fall Conference and Annual Marketing & Sales Conference. Providing networking and career opportunities is paramount.



AIMSE Leadership

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Man Group

Apply for Membership

Put the power of AIMSE content, programming,
and networking to work for you.

Become an AIMSE Member

\$395 annually



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