



# 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



AIMSE



# 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](#)
- [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	Highland Consulting
Albourne	LCG
AndCo.	Marquette Associates
Aon	Meketa
Callan	Mercer
Cambridge	NEPC
Canterbury Consulting	Rocaton
Cardinal Investment Advisors	Russell
Cliffwater	RVK
Curcio Webb	Segal Marco Advisors
DiMeco Schneider & Associates	SEI
Ellwood	Verus
FEG	Willis Towers Watson
Fiducient Advisors	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
California State Teacher's	Kentucky Retirement System	Sanofi
Retirement System	Maryland State Retirement and	SSM Healthcare
Carelton College	Pension System	St. Jude Children's Hospital
Carnegie Corporation	Mercy Health	State of Wyoming
CDPQ	Missouri Public School & Education	Teacher's Retirement System of
City of Detroit	Employee Retirement Systems	Texas
Cleveland Clinic Investment Office	New York State Common	Texas Municipal Retirement System
DePaul University	Retirement Fund	The Harry and Jeannette Weinberg
Doris Duke Charitable Trust	Northern Trust	Foundation
Drexel University	Novant Health	Trinity Healthcare
Hawaii Employee's Retirement	NY Presbyterian Hospital	University of Chicago
System	NYC Bureau of Asset Management	University System of Maryland
	Penn Mutual Asset Management	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

## 2022–2023 Officers

**Adam Gerentine**

President, AIMSE  
Trinity Street Asset Management

**Tony Buscemi**

Vice President, AIMSE  
Gallatin Capital LLC

**Matt Pawlak**

Treasurer, AIMSE  
Sands Capital

**Miriam Tai, CFA, CAIA**

President Emeritus, AIMSE  
Putnam Investments

## 2022–2023 Board of Directors

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**Chelsea Carbonel**

Dimensional Fund Advisors

**Sean Clark, CFA**

Westwood Management Corp.

**Peter Crivelli**

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**Lewis Del Ponte**

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**Maureen Kennedy Hays**

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CornerCap Investment Counsel

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Jennison Associates

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Epoch Investment Partners

**Keith Wosneski**

Mackenzie Investments

# 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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community



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