



AIMSE AIMSE Board of Directors – Criteria, Duties, and Responsibilities

AIMSE Mission Statement

The AIMSE mission is to provide an educational forum for those employed in the investment management sales and marketing services profession worldwide. AIMSE fosters high ethical and professional standards among our members regarding representation of investment products and services, with an educational emphasis on improving skills and enabling members to adapt to the changing needs of the marketplace.

The following lays out both the criteria for membership on the AIMSE Board of Directors (the “Board”) membership as well as duties and responsibilities of a Board member.

Criteria for Board Membership

The following are the criteria the Board considers for membership:

AIMSE Membership: Only active AIMSE members in good standing are eligible to become Board members.

Participation in AIMSE Activities: The Board considers all AIMSE-related activities a member has participated in including, but not limited to:

- Attending AIMSE events including the Annual Conference, Fall Conference, Regional events, Social Events (i.e., Holiday Party, Summer Cocktails, etc.)
- Volunteering to moderate a panel at a conference
- Volunteering to host a regional event

Candidate Diversity: AIMSE values diversity and inclusion among our members. We embrace the richness of perspectives that diversity affords. This includes the more commonly known definitions of diversity and also extends to the types of firms at which a Board member works (traditional vs. alternative, large vs. small, etc.) and also the geographic base of our Board members. We strive for our Board to represent the AIMSE members.

Acknowledgement: Prior to being put forth for an AIMSE Board seat, a member should confirm as part of the nominating process her or his personal expectations of AIMSE Board participation. We ask this to ensure the proposed nominee, and his or her firm, are fully able to commit to the financial and time commitment before having his or her nomination evaluated.

Nomination and Election Procedure: Nominations to the Board should be directed to the Membership Committee of the Board which will present candidates for the full Board to review at the late-April Board Meeting. Typically, the number of candidates put forward equals the number of available seats to fill. All open Board seats will be filled by simple majority voting.

Duties and Responsibilities

All AIMSE Board members are volunteers. Board members are leaders and actively involved in supporting the three pillars of AIMSE: education, access, and mentorship. Activities of Board members that embrace these pillars include creating and running events, recruiting conference attendees, mentoring newer members to AIMSE, etc.



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Term: A Board members term is for three years with a potential for a three year extension. Board member terms commence June 1st in the year they are appointed to the Board and the year of appointment is referred to as a “class.” Total Board size is 21 members and thus terms overlap to create a rotation of Board members with a few long-serving members rolling off each year to be replaced by new members. In addition to written by-laws, the AIMSE board seeks to capture institutional memory with a large historical body of knowledge from more “tenured” Board members about the running of AIMSE. Concurrently, the board seeks active participation from the next generation of professionals with potentially new ideas, experiences, and methods.

AIMSE Dues: All Board members must be AIMSE members in good standing. As a member in good standing, either you personally or your firm must commitment to pay annual membership dues (currently ~~\$350~~[\\$395](#)), conference attendee fees, regional event fees, and travel expenses, etc. There is no fee discount for Board membership.

Board Meeting Participation: All board members are expected to attend all board meetings and calls in person, if possible. Board meetings are typically held at the end of April around the Annual Conference and mid-October around the Fall Conference. There is usually a teleconference board call in January/February.

Attendance at AIMSE Events: All board members are ambassadors of the organizations and will attend as many AIMSE events as they are able. Attending AIMSE events is the best opportunity to interact with our members. Events include:

- Annual Conference
- Fall Conference
- Regional Events
- Social Events

Duties and Responsibilities: Board members annually will:

- Volunteer to Chair / Co-Chair a Board committee
- Nominate a Lothrop Recipient
- Nominate a new Board Member
- Provide one idea for a conference session
- Provide a speaker or panelist for a conference and assist conference committees in securing speakers and panelists
- Coordinate a regional meeting

Board members at some point during their three- (or six-) year term will volunteer to Co-Chair either the Annual Conference or Fall Conference.

Professionalism: Much of the day-to-day operations of the Board are carried out by the AIMSE Staff based in Reston, VA. Board members engage actively in a professional and respectful manner with AIMSE Staff professionals. AIMSE fosters high ethical and professional standards as one of our Mission statements and Board members should exemplify these attributes in actions.