



AIMSE

**The Association of Investment
Management Sales Executives**

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



2025 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 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

2024–2025 Officers

Matt Pawlak, AIF®

President, AIMSE
Sands Capital

Christa Maxwell, CFA, CIPM

Vice President, AIMSE
GW&K Investment Management

Claudette Grant, CAIA

Treasurer, AIMSE
BlackRock

Charlotte Walsh, CFA

Secretary, AIMSE
Jennison Associates

Tony Buscemi

President Emeritus, AIMSE
Gallatin Capital, LLC

2024–2025 Board of Directors

Chelsea Ramos, CFA

Ares Management

Sean Clark, CFA

Westwood Management Corp.

Peter Crivelli

Raymond James Investment Mgmt

Molly Giffen

Loomis, Sayles & Co.

Maureen Kennedy Hays

Michael Peck

Pier21 Asset Management

Jennifer Pittman

AllianceBernstein

Christy McKee

Schroders

Ramon Gonzalez, CFA

William Blair

Brad Haughey

Black Creek Investment Mgmt

Melissa Smith

Ariel Investments

Greg Graziano

Lazard

Rich Shusman, CFA, CAIA

Manulife

James Stafford, CFA

Atlanta Capital

Beth Brewer

T. Rowe Price

Jay Wiltshire, CFA

Epoch Investment Partners

Michelle Riffelmacher

EnTrust Global



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

Professional Designations:

CFA 145
CAIA 44
MBA 148
CIMA 12

Types of Investment Firms:

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

Geography:

Primarily US and Canada

Firm Types:

Traditional 229
Alternative 75
Combination 169



Platinum Sponsor – \$50,000

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 (3k followers) promotion of the virtual event. (created by AIMSE)

Regional Events

- Headline Sponsor for two (2) regional events

Event Visibility

- Speaking role at Annual Conference, details subject to the theme of the conference and agenda availability.
- Event sponsorship at the Annual Conference (ie. Morning Yoga, Tennis, Cornhole, Volleyball, Fun Run, Bocce Ball, Breakfast, Lunch.)
- Annual Conference event integration (determined based on each year's agenda/available options and sponsorship level)
- Attendance for four (4) at Annual, Fall, and Canadian Conference. Booth at all.
- Attendance at all regional events (excluding capacity-constrained events). **Additional sponsorship opportunities available.*



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 (3k followers) promotion of the virtual event. (created by AIMSE)

Event Visibility

- Speaking role at Annual Conference, details subject to the theme of the conference and agenda availability.
- Event sponsorship at the Annual Conference (ie. Morning Yoga, Tennis, Cornhole, Volleyball, Fun Run, Bocce Ball, Breakfast, Lunch.)
- Annual Conference event integration (determined based on each year's agenda/available options and sponsorship level)
- Attendance for four (4) at Annual, Fall, and Canadian Conference. Booth at all.
- Attendance at all regional events (excluding capacity-constrained events). **Additional sponsorship opportunities available.*



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 (3k followers) promotion of the virtual event. (created by AIMSE)

Event Visibility

- Event sponsorship at the Annual Conference (ie. Morning Yoga, Tennis, Cornhole, Volleyball, Fun Run, Bocce Ball, Breakfast, or Lunch.)
- Annual Conference event integration (determined based on each year's agenda/options and sponsorship level)
- Attendance for (3) at Annual, Fall and Canadian Conferences. Booth at all three events.
- Attendance at all regional events (excluding capacity-constrained events). **Additional sponsorship opportunities available.*



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

- Annual Conference event integration (determined based on each year's agenda/options and sponsorship level)
- Attendance for two (2) at Annual, Fall, and Canadian Conferences. Booth at all three events.
- Attendance at five (5) regional events (excluding capacity-constrained events). **Additional sponsorship opportunities available*



Affiliate Sponsor – \$5,000

Event Access

- Attendance for one (1) at all three Conferences – Annual, Fall, and Canadian
- Annual Conference event integration (determined based on each year's agenda/options and sponsorship level)
- Access to five (5) regional events (excluding capacity- constrained events). **Additional sponsorship opportunities available.*



Golf Sponsor – \$5,000

**Annual Conference Only*

Event Access

- Attendance for two (2) at the Annual Conference.
- Lead sponsor for Golf Tournament. Signage at event.
- Run individual activities of your choosing (closest to pin, longest drive, beat the pro, etc.).
- Table set up at up at two (2) holes to speak with each group that comes through the round.
- Announce the winner of the scramble and individual events and give out prizes at the post golf lunch.



Regional Sponsorships

**Regional Sponsorship Cost Varies by Event*

Event Access

- Regional events provide additional access and attendees to the AIMSE community.
- Each event sponsorship cost varies based on the nature and attendance level of the regional events.
- Sponsorship priority goes to highest level sponsor.
- Only (1) sponsor will have signage and speaking opportunities at a given regional event unless otherwise agreed upon.

2025 Events

Jan 22-23	Canadian Conference - Toronto
Jan 30	San Francisco – Callan Featured
Feb 27	Poker Power Event
Mar 19	South Florida – Panel & March Madness
Mar 20	Salt Lake City – Night at the Rink
Mar 26	Chicago– Night at the Rink
May 4-6	Annual Flagship Conference – Scottsdale
Apr	Chicago – Equities panel / reception
May/Jun	Philadelphia – Baseball Game
Summer	Detroit – panel / reception
Jul 17	Chicago – Cocktail Cruise
Aug / Sep	Denver – Baseball Game
Aug / Sep	St. Louis – Baseball Game
Sep	Norwalk, CT - Cocktail Cruise
Oct	Atlanta – Bowling for Bentleys
TBD	Santa Monica – Consultant Panel
TBD	San Diego – Meketa Featured
TBD	Seattle – Verus Featured
TBD	Denver – Consultant / Allocator Panel
TBD	NYC
TBD	Boston



Corporate Sponsor Form

Name of company (please print clearly)

Address

City

State

ZIP

Phone

Fax

Email

Name of contact person



AIMSE

Please Complete and Send to:

AIMSE

401 Edgewater Place • Suite 600 • Wakefield, MA 01880

Fax: 781-658-2664 • Email: info@aimse.org

Select Sponsorship Level

- Platinum Sponsor • \$50,000 Bronze Sponsor • \$10,000
 Gold Sponsor • \$30,000 Affiliate Sponsor • \$5,000
 Silver Sponsor • \$20,000 Golf Sponsor • \$5,000

Total payment

_____ (Payments MUST be made in US Dollars)

Method of payment

- Wire Transfer:** Payments/Credits Name of Bank:
Wells Fargo Bank, N.A., Bank Address: 420
Montgomery Street, San Francisco, CA USA Name on
Account: Association of Investment Management Sales
Executives Inc. Account Number: 2000028808703
ABA: 121000248 Swift Code: WFBIUS6S
- Credit card (*please charge*)
- Master Card Visa American Express

Card Number

Exp Date

CVC

Signature