



# AIMSE

**The Association of Investment  
Management Sales Executives**

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



## 2026 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

## 2025-2026 Officers

**Christa Maxwell, CFA, CIPM**  
President, AIMSE  
GW&K Investment Management

**Claudette Grant, CAIA**  
Vice President, AIMSE  
BlackRock

**Charlotte Walsh, CFA**  
Treasurer, AIMSE  
Jennison Associates

**Molly Giffen**  
Secretary, AIMSE  
Loomis, Sayles & Co.

**Matt Pawlak, AIF®**  
President Emeritus, AIMSE  
Sands Capital

## 2025-2026 Board of Directors

**Chelsea Ramos, CFA**  
Ares Management

**Rich Shusman, CFA, CAIA**  
Manulife Investment Management

**Ted Hart, CFA**  
Glenmede

**Jay Wiltshire, CFA**  
Epoch Investment Partners

**Jennifer Pittman**  
AllianceBernstein

**Michelle Riffelmacher**  
EnTrust Global

**Christy McKee**  
Schroders

**Ramon Gonzalez, CFA**  
William Blair

**Brad Haughey**  
Black Creek Investment Mgmt

**Melissa Smith**  
Ariel Investments

**Greg Graziano**  
Lazard

**Patricia Tiralongo, CFA**  
CIBC

**Beth Brewer**  
T. Rowe Price

**Michael Peck**  
Pier21 Asset Management

**Mike Randall**  
PGIM Quantitative Solutions

**Jordan Loh**  
Raymond James Investment Mgmt

**Yana Turner**  
Beutel Goodman

# 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 – \$40,000

## 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 subject to sponsorship availability)

## Event Visibility

- Speaking role at the "A Word from our Sponsors" during the Annual Conference.
- 1 event sponsorship at the Annual Conference (ie. Morning Yoga, Tennis, Cornhole, Volleyball, Fun Run, Bocce Ball, Breakfast, Lunch – excludes golf)
- Attendance for four (4) at Annual, Fall, and Canadian Conference. Booth at all.
- Attendance at 5 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 the "A Word from our Sponsors" during the Annual Conference.
- 1 event sponsorship at the Annual Conference (ie. Morning Yoga, Tennis, Cornhole, Volleyball, Fun Run, Bocce Ball, Breakfast, Lunch – excludes golf)
- Attendance for four (4) at Annual, Fall, and Canadian Conference. Booth at all.
- Attendance at 5 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

- Speaking role at the "A Word from our Sponsors" during the Annual Conference.
- Attendance for (3) at Annual, Fall and Canadian Conferences. Booth at all three events.
- Attendance at 3 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

- Attendance for two (2) at Annual, Fall, and Canadian Conferences. Booth at all three events.
- Attendance at three (3) 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
- Access to 2 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.
- (\*) next to event indicates capacity constrained event

## 2025 Events

Aug 13	Baltimore – Baseball Game
Aug 19	Denver – Baseball Game (*)
Aug 28	Philadelphia – Baseball Game
Sep 17	Norwalk - Cocktail Cruise
Sep 29-30	Chicago - Fall Conference 2025
Oct 7	Detroit – Cocktails & Panel
Oct 15	Philadelphia – Taft-Hartley Panel & Mini Golf
Oct 30	Austin – Paddles & Perspectives
Jan 14-15	Toronto - Canadian Conference
Apr 26-28	Naples - Annual Flagship Conference

## 2026 Events





# Corporate Sponsor Form

Name of company (please print clearly)

Address

City

State

ZIP

Phone

Fax

Email

Name of contact person



**Please Complete and Send to:**  
**AIMSE**

11130 Sunrise Valley Drive • Suite 350 • Reston, VA 20191 Fax:  
781658-2664 • Email: [info@aimse.org](mailto:info@aimse.org)

## Select Sponsorship Level

- ☐ Platinum Sponsor • \$40,000 ☐ 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