

# AIMSE

The Association of Investment  
Management Sales Executives

The only professional organization  
dedicated to serving the needs of  
investment management sales and  
marketing professionals.



## 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 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.

## 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 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

**AIMSE is your resource for peer networking, skills tuning and investor network expansion.**

## 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

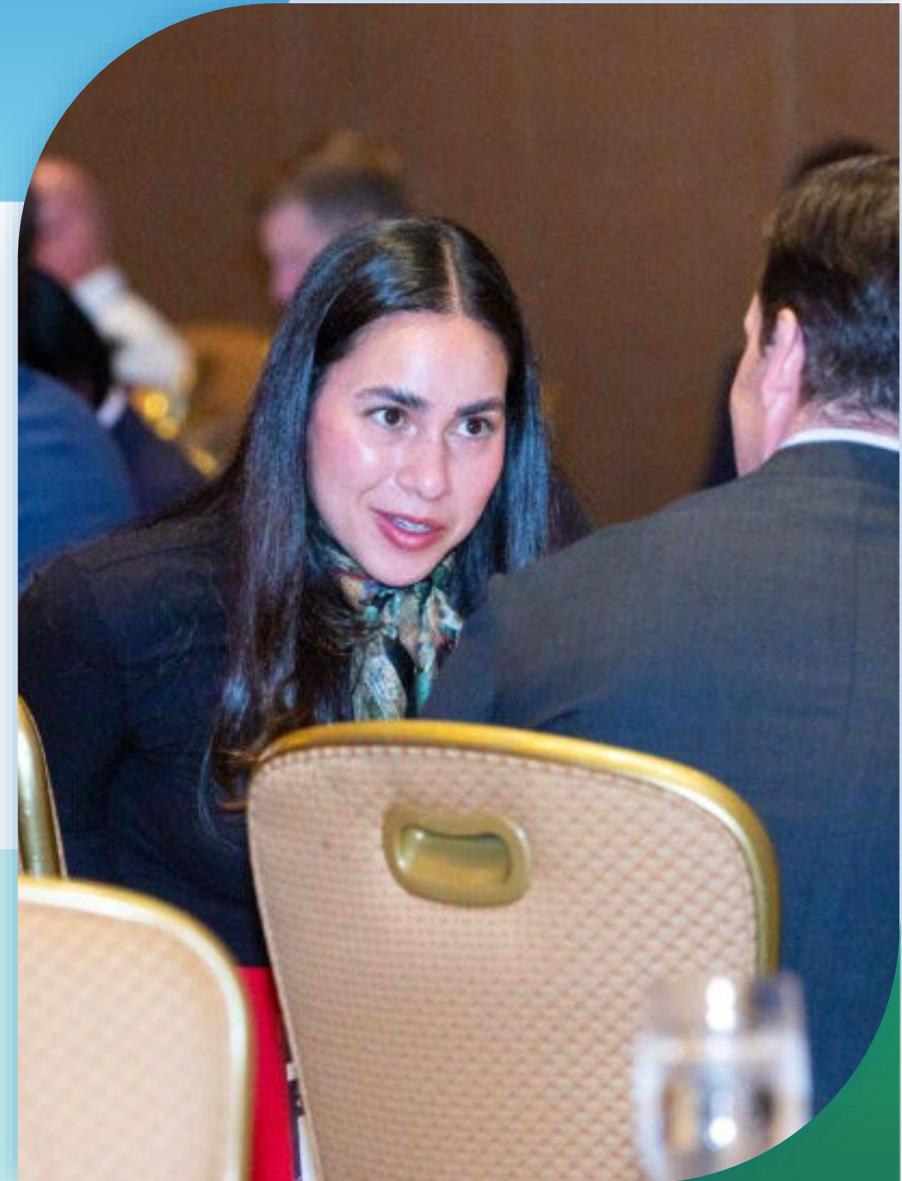
Our annual conference features a **Consultant Round Table**, an intimate, high-impact forum where participants connect directly with industry experts. In these small-group sessions, attendees gain insider perspectives on emerging trends, explore areas of strategic interest, and engage in Q&A with experienced consultants.

## Gain Investment Community Insights

Hear directly from investors about today's most compelling strategies and asset classes, plus tips for presenting your firm and strategy with clarity and confidence.

## Places for Engagement

- [Annual & Regional Events](#)
- [Committees](#)
- [Mentorship](#)



# Grow

## Professional Development

Our annual and regional conferences feature dynamic speakers who deliver fresh ideas, practical strategies, and motivating insights to elevate your craft.

AIMSE members have access to top industry consultants through small-group roundtable discussions for candid, peer-level dialogue, and panel presentations with interactive Q&A. These sessions are designed to accelerate your professional growth—equipping you with the knowledge, context, and confidence to lead with impact.

## 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 Conference
- 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.



**Consultant Profiles.** Firm overviews from many of the industry's leading consulting firms.

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

## Allocators

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

## 2025 –2026 Officers

**Christa Maxwell, CFA, CIPM**

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GW&K Investment  
Management

**Claudette Grant**

Vice President  
Blackrock

**Charlotte Walsh, CFA**

Treasurer  
Jennison Associates

**Molly Giffen**

Secretary  
Loomis, Sayles & Company

**Matthew Pawlak**

President Emeritus  
Sands Capital

## 2025–2026 Board of Directors

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**Edward Hart**

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CIBC

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Beutel Goodman

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Pugh Capital Management



# Join Today – Elevate Your Game!

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

**Become an AIMSE Member**

\$395 annually



Join our  
LinkedIn  
community



Visit our website  
[www.aimse.org](http://www.aimse.org)



Contact us  
[info@aimse.org](mailto:info@aimse.org)

