



**26<sup>th</sup> ANNUAL  
AIMSE CANADIAN CONFERENCE**

January 16-17, 2019  
Intercontinental Toronto Centre  
Toronto, ON

**EXHIBITOR AND SPONSOR  
PROSPECTUS**



**AIMSE  
CANADA**



## 26<sup>th</sup> ANNUAL AIMSE CANADIAN CONFERENCE

## SPONSOR & EXHIBITOR OPPORTUNITIES

### WHAT ARE THE BENEFITS?

Our conference is the only opportunity to meet this very targeted group of professionals on a one-to-one basis. As an exhibitor and/or sponsor, you can look forward to these benefits:

- Intimate access with your most valued clients and prospects.  
Participants come to Toronto from across North America and you can meet with this geographically diverse group by traveling to only one city
- Complimentary conference registrations  
*(number determined by level of commitment)*
- Complimentary Associate Membership in AIMSE
- An electronic file of the pre-registered attendee roster on December 7, 2018 and a final attendee roster post-conference
- Recognition and listing in the final conference program including a description of your firm, logo, and contact information
- Networking opportunities in the exhibit area, including breakfast and refreshment breaks
- Year-round listing on the AIMSE website
- An opportunity to introduce your firm following conference welcome remarks

### ARE YOU INTERESTED IN EXHIBITING AT MULTIPLE AIMSE CONFERENCES THROUGHOUT THE YEAR? WE ENCOURAGE YOU TO BECOME AN AIMSE CORPORATE SPONSOR!

We have created a Corporate Sponsor Program that offers a variety of opportunities to enhance your participation at our conferences and provides promotional exposure throughout the year. This sponsorship program is your opportunity to become a partner with AIMSE and increase your engagement with AIMSE members.

**SILVER, GOLD, AND PLATINUM-LEVEL CORPORATE SPONSOR PACKAGES ARE AVAILABLE.** Each package includes a variety of benefits valued at over \$45k. Contact the AIMSE office to determine which package is right for you!

### YOU'RE IN GOOD COMPANY!

#### Platinum Sponsors



**MANDATEWIRE**



#### Silver Sponsor

**Callan**



# SPONSOR & EXHIBITOR FEES

## **LEAD SPONSOR (\$10,000 USD/\$12,800 CAD)**

As Lead Sponsor your firm will have the opportunity to join the Conference Chair in welcoming participants to the 26th Annual AIMSE Canadian Conference.

### **Lead Sponsorship Includes:**

- Two Complimentary Registrations (additional registrations are available for \$350 USD)
- Complimentary Tabletop Exhibit
- Prominent Signage
- Full Page Ad in the Conference Program
- Acknowledgement in All Conference Promotional Materials
- Acknowledgement by Conference Chair Throughout the Event

## **RECEPTION SPONSOR (\$5,000 USD/\$6,400 CAD)**

### **Reception Sponsorship Includes:**

- One Complimentary Registration (additional registrations are available for \$350 USD)
- On-Site Signage
- Shared Ad Space in the Conference Program
- Acknowledgement by Conference Chair Throughout the Event

## **EXHIBITORS (\$3,500 USD/\$4,500 CAD)**

Exhibitors are entitled to set-up a 8' x 10' tabletop display. You will be supplied with table, chairs, and electrical hook-ups. Breakfast and refreshment breaks will be held in the exhibit space to facilitate networking with attendees.

### **Exhibitors Receive:**

- Two Complimentary Registrations (additional registrations are available for \$350 USD)
- Tabletop Exhibit
- On-Site Signage
- Shared Ad Space in the Conference Program
- Acknowledgement by Conference Chair Throughout the Event

## **BREAKFAST SPONSORSHIP (\$2,000 USD/\$2,500 CAD)**

### **Sponsorship of Breakfast Includes:**

- One Complimentary Registration (additional registrations are available for \$350 USD)
- On-Site Signage
- Shared Ad Space in the Conference Program
- Acknowledgement by Conference Chair Throughout the Event

## **REFRESHMENT BREAK SPONSORSHIP (\$1,000 USD/\$1,300 CAD)**

### **Sponsorship of a Refreshment Break Includes:**

- One Complimentary Registration (additional registrations are available for \$350 USD)
- On-Site Signage
- Shared Ad Space in the Conference Program
- Acknowledgement by Conference Chair Throughout the Event

**Questions?** Please contact: Katie Earley

703.234.4131

[kearley@virtualinc.com](mailto:kearley@virtualinc.com)



# General Information

## HOW TO RESERVE YOUR SPACE

The enclosed space application and contract should be completed and returned to the AIMSE office with your payment, in accordance with the rules and regulations in the contract. No space is assigned until the contract and full payment are received by AIMSE. Do not send in your contract unless you have enclosed full payment.

All fees are to be paid in US currency. Please list any competing companies on the contract that you would prefer not to be located near. Due to the fact that most exhibitors are competitors, it may be impossible to honour all requests. AIMSE makes all space assignments and has the final say in all assignments. AIMSE reserves the right to modify the designated exhibit space in the event a change is necessary. Table assignments are made on a first come, first served basis.

**NOTE:** Please read carefully the exhibit rules and regulations that are part of the application for space. It is important that the representatives from your company whom attend the conference are aware of the terms and conditions as well as the general information that affect the operation of the conference and exposition.

## EXHIBIT STAFF

Exhibitors must have a representative available to cover their table throughout the conference. The \$3,500.00 USD exhibit fee entitles each exhibitor to have two (2) representatives attend the conference. Additional company representatives must be members of AIMSE and register for the conference at the discounted group registration fee.

AIMSE does not issue media passes to any conference or event and does not allow members of the “working press” to attend the AIMSE Canadian Conference since it is an educational meeting, not a “media event.” Reporters are not eligible or invited to attend.

## REGISTRATION INFORMATION

The two exhibit representatives listed on the Exhibitor Contract will be registered for the conference and receive an AIMSE Associate membership.

## ASSOCIATE MEMBERSHIPS

Two (2) representatives that attend the conference to cover your exhibit table will be considered AIMSE Associate Members for one year.

## ADDITIONAL STAFF WHO WISH TO ATTEND

Additional staff members wishing to attend the conference must pay the discounted registration fee of \$350 USD. These individuals must be current AIMSE members.

## ACTIVE VS. ASSOCIATE MEMBERSHIP

AIMSE Active Membership is open ONLY to those who devote all or a major portion of their time to the marketing or selling of investment management products/services. Membership is by individual only.

AIMSE Associate Membership is open ONLY to those who are regularly engaged in and devote a significant portion of his/her time to business activities directly relating to or involving the profession of investment management marketing and sales. Membership is by individual only. Consultants, representatives of executive search firms, and members of the “working press” are not eligible for membership in AIMSE.

## LOCATION

Intercontinental Toronto Centre  
225 Front Street West Toronto, Ontario

## EXHIBIT SHOW DATE

Thursday, January 17, 2019

## SET-UP

Thursday, January 17 | 7:00 am - 8:00 am. All exhibit installations must be completed by 8:00 am.

## TEAR-DOWN

Thursday, January 17 | 5:15 pm.  
Materials must be removed by 5:15 pm.

## EXHIBIT HOURS

Thursday, January 17 | 8:00 am - 5:15 pm.



# General Information

## CUSTOMS & SHIPPING

AIMSE has made arrangements with North American Logistics Services Inc. as the official Customs Broker for this conference.

## BOOTH DESCRIPTION

Exhibit space is 8' x 10', pop-up displays are optional. Furnishings provided: One 6' draped table, two chairs, one wastebasket, one electrical outlet, and one 11" x 13.5" ID sign.

All other items **MUST BE ORDERED IN ADVANCE** and paid directly to the hotel.

## HOTEL RESERVATIONS

Sponsors/Exhibitors must book their own hotel reservations by December 16, 2018 to receive the group rate. No hotel reservations will be made through the AIMSE office.

To reserve a room, call the Intercontinental Toronto Centre at 800.235.4670 and be sure to state that you are with the AIMSE 2019 Canadian Conference to receive the group rate of \$279 CAD for a single room.

## PRIVATE PARTIES/HOSPITALITY SUITES

It is against AIMSE policy for any company, organization or individual to conduct private parties, lunches, dinners or hospitality suites during the dates or times of the AIMSE Canadian Conference.

## ATTENDEE ROSTER

**AIMSE will email a list of attendees to each sponsor/exhibitor contact person on December 7, 2018. A final list of attendees will be provided post-conference.**

**AIMSE provides conference attendee lists for informational purposes only. AIMSE respects our members and conference attendees and must protect the integrity and effectiveness of our organization's messages by minimizing unsolicited, mass-delivered messaging. Exhibiting and sponsoring companies may not utilize conference attendee lists to conduct mass phone, e-mail, or mail communication. This is a non-negotiable AIMSE policy.**

**AIMSE Staff:** If you have any questions regarding exhibits and sponsorships, please contact: Katie Earley, 703.234.4131, [kearley@virtualinc.com](mailto:kearley@virtualinc.com)

## 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.

## MEDIA GUIDELINES POLICY

AIMSE conference registration materials clearly state that executive recruiters, consultants and members of the "working press" are not eligible for AIMSE membership and therefore ineligible to attend AIMSE conferences. AIMSE conferences are not media events and therefore the organization does not issue media passes to any conference or event.



# General Information

AIMSE does recognize investment trade publications as useful tools to the investment management sales and marketing services profession and encourages participation by such organizations as associate members. In accordance with this stated policy, associate AIMSE members of these investment trade publications must comply with the statements of the policy to remain in good standing as members.

AIMSE conferences are off-the-record, to enable members and panelists to speak more candidly than they may when their comments might end up in print, possibly with their organizational affiliation listed as well. The presence of the press could impede open discussion during these educational sessions. AIMSE members, as well as guest speakers, have expressed this concern. The free exchange of ideas is a vital part of AIMSE. The attendance of “working press” could have a dampening effect on open discussion.

Members of the media are, of course, free to interview participants outside of AIMSE conference sessions, as long as they clearly identify themselves and indicate that the participant may be quoted in print.

Discussions occurring in AIMSE conference sessions are off-the-record out of respect for personal and corporate policies over public attribution. It is up to each attendee and/or speaker whether he or she wishes (his or her own) statements made in the course of a session to be quoted in the media.

In the course of the customary self-introductions at the outset of each conference session, the moderator will ask if any such person is in attendance, and if so, out of fairness, will insist on compliance with the off-the-record rule.



For more information, please feel free to contact:

**Chris Paolella**

AIMSE President

Invesco

404.439.4548

[chris.paolella@invesco.com](mailto:chris.paolella@invesco.com)

**Kathy Hoskins**

Executive Director

703.234.4130

[khoskins@virtualinc.com](mailto:khoskins@virtualinc.com)



# Exhibitor Contract

Complete information below as you wish it to appear in AIMSE promotional materials

COMPANY \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

PHONE \_\_\_\_\_ FAX \_\_\_\_\_ EMAIL \_\_\_\_\_

NAME OF CONTACT PERSON \_\_\_\_\_

## Exhibit Staff Personnel /Names for Badges

1. NAME \_\_\_\_\_ JOB TITLE \_\_\_\_\_

PHONE NUMBER \_\_\_\_\_ EMAIL \_\_\_\_\_

2. NAME \_\_\_\_\_ JOB TITLE \_\_\_\_\_

PHONE NUMBER \_\_\_\_\_ EMAIL \_\_\_\_\_

## AIMSE Media Guideline Policy Agreement

By submitting this Exhibit Space Application and Contract, the above-named company requests space in the exposition to be held January 17, 2019 at the Intercontinental Toronto Centre.

We agree to pay AIMSE for said space in accordance with terms and conditions outlined herein, and understand that, once accepted by AIMSE, this document, including the Rules and Regulations printed on the back hereof, constitute a valid and binding contract between AIMSE and us. We agree to comply with all instructions, rules, and regulations as set out herein.

I hereby certify that I \_\_\_\_\_ (name of exhibit representative) representing \_\_\_\_\_ (name of exhibiting company) have read and agree to the AIMSE Media Guideline Policy. I will distribute this policy to \_\_\_\_\_ (name of exhibiting company) colleagues attending the AIMSE conference and will make certain that all company representatives adhere to this policy while attending the conference.

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

I, the duly authorized representative of the above-named company, on behalf of said company, subscribe and agree to all the terms, conditions authorizations and covenants contained in this Exhibit Space. Application and Contract and the Rules and Regulations set out hereof. I enclose the amount of **\$3,500 USD** per space. I understand that **AIMSE will not accept deposits or partial payments. AIMSE must receive full payment by no later than 7 business days prior to the start of the conference.**

AUTHORIZED SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_

Please list any competing companies that may participate whose booth you'd prefer not to be adjacent to:

*NOTE: Due to the fact that most exhibitors are competitors, it may be impossible to honour all requests. AIMSE makes all space assignments and will have final say in all space assignments.*

## Payment Information

Number of tabletop exhibits \_\_\_\_\_

☐ I have enclosed the amount of \$3,500 USD per 8' x 10' tabletop exhibit.

I understand that AIMSE will not accept deposits or partial payments.

☐ Enclosed is my cheque, payable to AIMSE (Remittance accepted ONLY in US currency)

☐ Please charge payment to: ☐ VISA ☐ MasterCard ☐ American Express

CARD NUMBER \_\_\_\_\_ DATE \_\_\_\_\_

NAME ON CARD \_\_\_\_\_ SIGNATURE \_\_\_\_\_



**AIMSE**  
**CANADA**

### Please return with payment to:

AIMSE | Attn: Katie Earley  
11130 Sunrise Valley Drive,  
Suite 350  
Reston, Virginia 20191  
FAX: 703.435.4390  
[kearley@virtualinc.com](mailto:kearley@virtualinc.com)



# Sponsorship Contract

Complete information below as you wish it to appear in AIMSE promotional materials

COMPANY \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

PHONE \_\_\_\_\_ FAX \_\_\_\_\_ EMAIL \_\_\_\_\_

NAME OF CONTACT PERSON \_\_\_\_\_

**Yes!** We would like to sponsor the AIMSE Canadian Conference activities checked below:

- ☐ **Lead Sponsor** (\$10,000 USD)
- ☐ **Reception Sponsor** (\$5,000 USD)
- ☐ **Breakfast Sponsor** (\$2,000 USD)
- ☐ **Refreshment Break Sponsor (2)** (\$1,000 USD each)

We are pleased to commit a total of \$ \_\_\_\_\_

*AIMSE must receive full payment by no later than 7 business days prior to the start of the conference.*

## Payment Information

- ☐ Enclosed is my cheque, payable to AIMSE (Remittance accepted ONLY in US currency)
- ☐ Please charge payment to: ☐ VISA ☐ MasterCard ☐ American Express

CARD NUMBER \_\_\_\_\_ DATE \_\_\_\_\_

NAME ON CARD \_\_\_\_\_ SIGNATURE \_\_\_\_\_



### Please return with payment to:

AIMSE | Attn: Katie Earley  
11130 Sunrise Valley Drive,  
Suite 350  
Reston, Virginia 20191  
FAX: 703.435.4390  
[kearley@virtualinc.com](mailto:kearley@virtualinc.com)





Save the Date

## AIMSE 42<sup>nd</sup> ANNUAL MARKETING & SALES CONFERENCE

APRIL 28-30, 2019  
ARIZONA BILTMORE  
PHOENIX, AZ



**AIMSE**

## AIMSE 2019 FALL CONFERENCE

OCTOBER 16-17, 2019  
THE WESTIN NEW YORK AT TIMES SQUARE  
NEW YORK, NY





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[www.aimse.org](http://www.aimse.org)