40TH ANNIVERSARY
1977 2017
ENGAGE. GROW. SUCCEED.

AIMSE

40TH ANNUAL MARKETING & SALES CONFERENCE

APRIL 30 – MAY 2, 2017 • FAIRMONT SCOTTSDALE PRINCESS • SCOTTSDALE, AZ

PRELIMINARY PROGRAM

AIMSE 40TH ANNUAL
MARKETING & SALES CONFERENCE

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"Each audience is different"

– Prince

DEAR AIMSE MEMBERS:

Thank you for being part of the 40th AIMSE Annual Marketing & Sales Conference. We are thrilled and honored to have created an educational, impactful, and memorable program for you. We truly appreciate your attendance and look forward to seeing everyone interact, share ideas, learn, and have fun.

Our theme this year echoes AIMSE's mission to ENGAGE, GROW, and SUCCEED. From the key note speakers to the allocators to the social activities, we encourage you to take advantage of your peers' knowledge, experience, and backgrounds and help each other succeed. It ain't easy out there and we hope these few days will help you gain that extra edge.

The program contains an impressive line-up of industry leaders from their respective fields, with sessions diversified across channels, subject matters, and human behavior. A few highlights:

- Keynote speakers that include Dr. Gio Valiante, a performance psychologist who helps professional athletes and money managers to out-perform; Buddy Bush, an expert on collaborating across the generations; and Filippo Bartolotta, an Italian wine journalist who will demystify the drinking and ordering of wine so that we can all order with authority in front of our bosses
- Featured consultant presentations from the President of NEPC and the Head of Global Investment Research at Cambridge Associates
- Six breakout sessions that focus on specific channels and topical investment management trends
- The forever popular Consultant Roundtables that are well represented by both traditional and alternative consulting experts

As always, we have partnered with industry leading vendors who have developed robust and intelligent tools to help sales executives succeed. They would love to meet you and find out how they can help your firms succeed in this increasingly competitive market place.

Of course, it wouldn't be an AIMSE conference if we didn't include fun events to help foster new relationships and strengthen existing ones. In addition to our traditional golf, tennis, and volleyball tournaments, we have a few special surprises to celebrate 40 years of engaging, growing, and succeeding together!

We want to say thank you to this year's conference committee for their tireless efforts to deliver a program that will help you excel as an investment management sales professional. If you are interested in getting more involved in future AIMSE events, please seek out a member of our planning committee or the AIMSE Board of Directors.

Again, thanks for your attendance and we look forward to seeing you at the conference.

Sincerely,

Miriam Tai & Mark Robertson
Conference Co-Chairs

SCHEDULE AT A GLANCE

SUNDAY, APRIL 30

7:00–8:00 am	Golf Tournament Registration & Breakfast*
8:00 am–12:00 pm	Golf Tournament*
10:00–11:30 am	Golf Clinic*
12:00–1:30 pm	Luncheon for Golf Tournament and Clinic Participants*
1:00–3:30 pm	AIMSE Boot Camp (Basic Program)
3:30 - 5:30 pm	AIMSE Boot Camp (Advanced Program)
4:00–8:00 pm	Conference Registration
6:00–6:30 pm	Newcomer & Mentor Reception
6:30–9:30 pm	Welcome & Exhibitor Reception

**Optional activities. Additional registration fee required to participate.*

MONDAY, MAY 1

7:00 am–3:30 pm	Conference Registration
7:00–8:00 am	Breakfast with Exhibitors
8:00–8:15 am	AIMSE President's Welcome
8:15–9:15 am	KEYNOTE PRESENTATION BY **DR. GIO VALIANTE** Fearless, Focused and Mentally Free: Key Findings from Performance Psychology that Work!
9:15–9:35 am	Refreshment Break with Exhibitors
9:40–9:50 am	A Word from our Partners
9:50–10:35 am	FEATURED CONSULTANT: CAMBRIDGE ASSOCIATES **Noel O'Neill** Head of Global Investment Research Cambridge Associates
10:45–11:40 am	Concurrent Breakout Sessions SESSION 1: CORPORATE PENSION PLANS – THE CHANGING LANDSCAPE SESSION 2: THE FUTURE OF PUBLIC PENSION INVESTING
11:45 am–1:00 pm	Networking Lunch with Exhibitors The Impact of The DOL Fiduciary Rule on Asset Managers
1:00–1:10 pm	A Word from our Partners

1:10–2:10 pm	KEYNOTE PRESENTATION BY **FILIPPO BARTOLOTTA** Wine Speak
2:10–2:30 pm	Refreshment Break with Exhibitors
2:30–3:25 pm	Concurrent Breakout Sessions SESSION 3: INSURANCE INVESTING – KEY CONSIDERATIONS SESSION 4: MANAGING LONG-TERM ENDOWMENTS IN THE MIDST OF UNCERTAINTY
4:30–6:45 pm	Optional Outdoor Activities ◆ Tennis Tournament ◆ Volleyball Tournament
7:30–8:00 pm	Cocktail Reception
8:00–11:00 pm	DINNER & AIMSE LOTHROP AWARD PRESENTATION

TUESDAY, MAY 2

7:00 am–1:30 pm	Conference Registration
7:00–8:00 am	Breakfast with Exhibitors & AIMSE Annual Business Meeting
8:00–9:15 am	KEYNOTE PRESENTATION BY **BUDDY BUSH** Tackling Challenges of the Multigenerational Workforce
9:15–9:35 am	Refreshment Break with Exhibitors
9:35–10:25 am	FEATURED CONSULTANT: NEPC **Michael Manning, CFA, CAIA** Managing Partner NEPC
10:30–11:25 am	Concurrent Breakout Sessions SESSION 5: ACTIVE VS. PASSIVE TUG OF WAR: WHO WILL WIN? SESSION 6: WHITE LABELING AND NEW PRODUCT PANEL
11:30 am–1:20 pm	Consultant Roundtables
1:20–2:20 pm	Networking Lunch with Exhibitors

Program and speakers subject to change. Visit http://www.aimse.org for updates.

ENGAGE. GROW. SUCCEED.

EXTENDED SCHEDULE

SUNDAY, APRIL 30

7:00–8:00 am Golf Tournament Registration & Breakfast

8:00 am–12:00 pm Golf Tournament | TPC Scottsdale Stadium Course

10:00–11:30 am Golf Clinic | TPC Scottsdale

Golf is a proven business development skill. Are you new to the game or interested in an early season tune-up rather than playing the full tournament? We've organized the golf clinic just for you. The clinic includes use of rental golf clubs and offers 1.5 hours of personalized instruction from resort golf professionals on all the basics of the game (full swing, putting and chipping). Lunch, water and soft drinks will be provided.

12:00–1:30 pm Luncheon for Golf Tournament and Clinic Participants

1:00–3:30 pm AIMSE Boot Camp (Basic Program)

This pre-conference session is targeted toward those marketers new to the business as well as more experienced marketers looking to shift their sales performance into high gear. The goal of this session is to provide guidance on a "soup to nuts" approach to marketing success for both traditional and alternative products. The AIMSE Boot Camp is an opportunity to learn and ultimately succeed as this program was created by investment sales professionals for investment sales professionals.

Topics will include:
- Understanding the Investor Sales Cycle
- Building a Team
- Engaging Investors
- Presentation Skills
- Building Relationships
- Due Diligence
- Marketing Resources
- Marketing Tips and Tricks

MODERATORS

Michael Gillis
Senior Vice President, Business Development
Greystone Managed Investments, Inc.

Chris Rae
Managing Director
Elevation Marketing Advisory

3:30 - 5:30 pm AIMSE Boot Camp (Advanced Program)

The following programs are part of the Advanced Program. Attendees of the Basic Program are encouraged to stay for the Advanced Programs. No prior Boot Camp experience is necessary!

SKILLS AND KNOWLEDGE TRACK

3:30 – 4:30 pm

Writing a Marketing Plan and Other Marketing Skills

This session will focus on developing a coherent marketing plan. Regardless of whether you are new to the business or run an experienced team, this session will be focused on helping you to write a custom marketing plan.

MODERATORS

Michael Gillis
Senior Vice President, Business Development
Greystone Managed Investments, Inc.

Dick Hoag
Senior Institutional Sales and Client Service
Sawgrass Asset Management

4:30 – 5:30 pm

Maximizing CRM and Performance Modeling

This session will focus on the vocational and technical skills for building and maximizing your client relationship management ("CRM") system as well as basic performance modeling for marketers. This session will focus on analyzing investment performance the way that an investor or consultant does.

MODERATOR

Chris Rae
Managing Director
Elevation Marketing Advisory

INVESTOR TRACK

3:30 – 4:30 pm

Marketing to Consultants

This session will focus on targeting, engaging, and succeeding with investment consultants. We will focus on understanding their role within the industry as well as their organizational structure and process.

MODERATORS

Maureen Kennedy Hays
Managing Director, Consultant Relations
Principal Global Investors

Carolyn Patton
Managing Director
Deutsche Asset Management

4:30 – 5:30 pm

Marketing to Endowments and Foundations

This session will focus on targeting, engaging, and succeeding with endowments & foundations. We will focus on better understanding the "endowment model" which has become the standard for modern institutional investors.

MODERATOR

Dale Kindregan
Executive Director, Endowments and Foundations
UBS Asset Management (Americas)

4:00–8:00 pm Conference Registration

6:00–6:30 pm Newcomer & Mentor Reception

6:30–9:30 pm Welcome & Exhibitor Reception

MONDAY, MAY 1

7:00 am–3:30 pm Conference Registration

7:00–8:00 am Breakfast with Exhibitors

8:00–8:15 am AIMSE President's Welcome

8:15–9:15 am KEYNOTE PRESENTATION BY **DR. GIO VALIANTE**
Fearless, Focused and Mentally Free:
Key Findings from Performance Psychology that Work!

An achievement domain is defined as any field with a measurable score. There is abundant psychological research that explores how people think, feel, and act while working in high pressure achievement domains (sports, markets, sales, and academia to name a few), and the types of attitudes, beliefs, and habits that lead to the best outcomes. Dr. Valiante will lay out the key psychological factors that his clients – some of the best in the world at their respective crafts – demonstrate to push the boundaries of ultimate human performance… all with an eye to helping participants develop a better understanding of themselves, the conscious and unconscious factors that impact their thinking, and how these factors interact with their personal lives to give them a psychological advantage in the competitive landscape.

9:15–9:35 am Refreshment Break with Exhibitors

9:40–9:50 am A Word from our Partners

9:50–10:35 am FEATURED CONSULTANT: CAMBRIDGE ASSOCIATES

Noel O'Neill
Head of Global Investment Research
Cambridge Associates

Cambridge Associates is global investment firm founded in 1973 that builds customized investment portfolios for institutional investors and private clients around the world. Working alongside its early clients, among them several leading universities, the firm pioneered the strategy of high equity orientation and broad diversification, which since the 1980s has been a primary driver of performance for these leading fiduciary investors. Cambridge Associates serves over 1,000 global investors – primarily foundations and endowments, pensions and family offices – and delivers a range of services, including outsourced investment (OCIO) solutions, traditional consulting services, and access to research and tools across global asset classes. Cambridge Associates has more than 1,200 employees – including over 150 research staff – serving its client base globally. The firm maintains offices in Arlington, VA; Boston; Dallas; Menlo Park and San Francisco, CA; London; Singapore; Sydney; and Beijing. Cambridge Associates consists of five global investment consulting affiliates that are all under common ownership and control. For more information about Cambridge Associates, please visit **www.cambridgeassociates.com**.

10:45–11:40 am Concurrent Breakout Sessions

SESSION 1: CORPORATE PENSION PLANS – THE CHANGING LANDSCAPE

Corporate pension plans oversee roughly $2 trillion in assets under management. The Pension Benefit Guaranty Corporation estimates that about 30 million Americans are earning pensions from the roughly 44,000 single employer pension plans in the US. Over the recent years, we have seen an acceleration in the transition from traditional defined benefit (DB) pension plans to defined contribution (DC) pension arrangements. Have DC plans won the pension war? Will DB plans gradually disappear? Will DC plans be able to deliver a desired level of retirement income? What will the pension plans of the future look like? During this session, we will explore the perspectives of corporate pension investment professionals and how they are managing not only the volatile equity markets, but also the low interest rate environment and discuss some of the trends in pension plan design, management and regulation, and the impact they have on how plan assets are invested.

MODERATOR

Brian Lee
Director of Marketing & Client Service
Oberweis Asset Management, Inc.

SPEAKERS

Brian Birnbaum, CFA
Senior Vice President
Graystone Consulting

Thomas C. Foster
Director, Pension & Trust Investments
Pinnacle West Capital Corporation

Joe Thomas
Director of Treasury
BJC Healthcare

SESSION 2: THE FUTURE OF PUBLIC PENSION INVESTING

Marketing to Public Pension Plans is as complicated as it ever has been. The increased role of the consultant, the strengthening of the staff's credentials and the complexity of rules governing interactions with board members should give us all a reason to sit back and examine our approaches. This panel of Public Plan experts will deconstruct the roles involved in running a Public Pension Plan, their interactions with their trusted advisors as well as answering your questions on how to best pursue meeting with them. Join us as we put a microscope on the process and how you can best approach the largest source of investable assets in the United States.

MODERATOR

Larry Pokora
Global Director of Investor Relations & Marketing
LibreMax Capital

SPEAKERS

Larry Krummen, CFA
Chief Investment Officer
Missouri Department of Transportation

Kevin Leonard
Director of Public Fund Consulting
NEPC

Steve Yoakum
Executive Director
Public School Retirement System of Missouri

11:45 am–1:00 pm Networking Lunch with Exhibitors
The Impact of The DOL Fiduciary Rule on Asset Managers

The election of Donald Trump, along with a unified Republican Congress, has generated tremendous anticipation for potential changes in the financial services sector. Gib Watson, President Emeritus of Envestnet Asset Management, will provide us with an update on the impact of the DOL Fiduciary Rule on asset managers under the current Administration and how Envestnet is positioned for potential regulatory changes.

SPEAKER

J. Gibson Watson III, CIMA
Industry Consultant and Group President Emeritus
Envestnet Asset Management, Inc.

1:00–1:10 pm A Word from our Partners

1:10–2:10 pm

KEYNOTE PRESENTATION BY **FILIPPO BARTOLOTTA**

Wine Speak

Ever been in a restaurant and handed the wine list and feel a bit lost? The sommelier pours you a taste and the first and last thing on your mind is how not to splash it all over your client's shirt? Not sure if the cork smells like good cork or if the wine smells badly corked? You are convinced something smells like bad eggs but how do you not act obnoxious while returning the wine?

No fret, Filippo will unleash your senses and show you how to select, sniff, swirl, and sip with aplomb. You will walk away with confidence in ordering wine for all occasions, and not dread the boss handing you the wine binder ever again. Plus, you'll have fun doing it!

2:10–2:30 pm

Refreshment Break with Exhibitors

2:30–3:25 pm

Concurrent Breakout Sessions

SESSION 3: INSURANCE INVESTING – KEY CONSIDERATIONS

The insurance market differs from other institutional markets and is facing increased regulation requiring more specific investment needs. Leaders in the insurance industry will highlight trends in various segments of the institutional insurance marketplace, focusing on asset flows and guidance on the most effective way to partner with this channel.

MODERATOR

Luke Schlafly, CFA
Head of Insurance Business Development
PineBridge Investments

SPEAKERS

Larry Cochran
Chief Investment Officer, Head of Treasury
ProAssurance

Andrew Coupe
Senior Insurance Investment Consultant
Willis Towers Watson

Kent Knudsen, CFA
Senior Vice President, Alternative Investments
Mutual of Omaha

Timothy Matson
Chief Investment Officer
Reinsurance Group of America, Incorporated

SESSION 4: MANAGING LONG-TERM ENDOWMENTS IN THE MIDST OF UNCERTAINTY

Boards and investment offices struggle daily to find the right balance among risk, return and liquidity in a constantly shifting investment landscape. Balancing short-term and long-term goals can be very difficult in a world where global economic forces, geopolitical landscapes and global securities markets can change on a dime. Most larger universities, foundations and non-profit healthcare organizations continue to implement the endowment model for their long-term pools of capital. Has the substantial allocation to active, alternative investments worked over the long-term? Can investment staffs add value via strategic or tactical asset allocation or manager selection? Has alpha "dried up" in certain hedge funds, private equity, real estate and other real assets due to big flows from retail and public fund dollars? What is a reasonable annual return objective for the next five years? How should long-term investors look at passive investments versus active? What is the best way to interact with your peers regarding managers, asset allocation and IC management? Our panel of CIO's plan to address these questions, plus give you insights on how they have successfully navigated challenging investment environments over their careers and how they plan to sail forward in 2017 and beyond. This panel will be very interactive with the audience so bring your questions!

MODERATOR

Dale Kindregan
Executive Director, Endowments and Foundations
UBS Asset Management (Americas)

SPEAKERS

Tim Barrett, CFA
Associate Vice Chancellor & Chief Investment Officer
Texas Tech University System

Michael Condon, CFA
Senior Vice President, Outsourced CIO
Fund Evaluation Group

Tony O'Toole
Chief Financial & Investment Officer
Truth Initiative

4:30–6:45 pm Optional Outdoor Activities

- Tennis Tournament
  Tennis facilities are located at Sanctuary Resort at Camelback Mountain. Transportation will be provided for participants. Transfer time from Fairmont Scottsdale Princess is approximately 20-30 minutes.

- Volleyball Tournament

7:30–8:00 pm Cocktail Reception

8:00–11:00 pm DINNER & AIMSE LOTHROP AWARD PRESENTATION

The prestigious Richard A. Lothrop Outstanding Achievement Award is presented each year at the AIMSE Annual Conference and is one of the most coveted honors in the investment management industry. Award criteria include dedication and service to:

- The industry
- AIMSE
- The community
- Mentorship and service to others

TUESDAY, MAY 2

7:00 am–1:30 pm Conference Registration

7:00–8:00 am Breakfast with Exhibitors & AIMSE Annual Business Meeting

8:00–9:15 am KEYNOTE PRESENTATION BY **BUDDY BUSH**
Tackling Challenges of the Multigenerational Workforce

Henry David Thoreau wrote, "Every generation laughs at the old fashions, but follows religiously the new." He may have been correct, but for those of us who cannot retreat to the woods, it is imperative that all ages learn to work together. To do so, an important first step is to understand the historical and societal trends that have shaped each generation. With three (maybe four) generations in the workplace, that is often easier said than done. Buddy Bush from JB Training Solutions is here to give us that historical perspective and actionable advice to help bridge the gap among all generations.

9:15–9:35 am Refreshment Break with Exhibitors

9:35–10:25 am FEATURED CONSULTANT: NEPC

Michael Manning, CFA, CAIA
Managing Partner
NEPC

NEPC provides advisory and outsourced chief investment officer (OCIO) services to clients looking for passionate advisors delivering deeply-researched, custom solutions. Our focus on clients and love for investing defines everything we do and offer to clients. This focus reinforces our desire to stay independent, provide leading investment research across the liquidity spectrum through our nearly 50-person research team, create solutions that go beyond just investments, and to provide exceptional service to our clients. Our unique culture and independence attracts some of the finest professionals in the industry, including over 250 professionals located across the U.S. Lastly, this focus has led to our success, attracting over 350 clients with aggregate assets of over $900 billion in seven specialty practices, including endowments and foundations, healthcare, private wealth, corporate pension, defined contribution, public pension, and Taft-Hartley funds. We would welcome the opportunity to partner with you and show you the difference our unique culture delivers to our clients.

10:30–11:25 am Concurrent Breakout Sessions

SESSION 5: ACTIVE VS. PASSIVE TUG OF WAR: WHO WILL WIN?

Passive investing is here to stay, and the rise of this investment style has had a meaningful impact on the investment management industry. However, there are proponents of the idea that we are approaching an inflection point in this trend of investing passively. The last 25 years have taught us that passive and active strategies each perform better in certain market environments, and the influencing factors behind an investors' decision making process also changes with time. This panel of allocators will discuss how they think through the lower fees and tightened tracking error of index replication versus the risk management and potential excess return of active management when constructing their portfolios or advising their clients. How has this on-going debate evolved over time, and what changes can we expect in the future?

MODERATOR

Joseph D. Taiber, CFA
Managing Partner
Taiber Kosmala & Associates

SPEAKERS

Sandra M. Ackermann-Schaufler, CFA
Head of International and Emerging Markets Equity & Senior Portfolio Advisor
SEI - Investment Management Unit

Alex Farquhar, CFA
Senior Consultant & Director of Traditional Manager Research
Ellwood Associates

Darrel Pfeifauf
Senior Vice President
Summit Strategies Group

SESSION 6: WHITE LABELING AND NEW PRODUCT PANEL

White label funds combine various investment vehicles in one "non-branded" investment option. The white label structure is on the rise because it allows for the use of a wider range of complementary investment styles and makes ongoing manager changes easier and less disruptive. The white label trend has far reaching implications because it grants much greater flexibility to choose and combine investment managers, opening doors for some and closing doors for others. This session will provide attendees with fluency in the white label concept and explain the forces behind the growth in white labelling and the impact a white label world will have on buyers, sellers and investors.

MODERATOR

Holly Verdeyen
Director, Defined Contribution Investments
Russell Investments

SPEAKER

Ross Bremen, CFA
Partner
NEPC

Chris Lakatosh, CFP, AIF
Principal & Senior Consultant
Cornerstone Institutional Investors, Inc.

Ken Menezes
Managing Director of Treasury & Asset Management
American Airlines, Inc.

11:30 am–1:20 pm Consultant Roundtables

One of our most popular sessions, this consultant roundtable will include a diversified group of traditional and alternative consultants. Get ready to roll up your sleeves, ask questions and listen, learn, and adapt as top consultants share their firm's priorities, manager search activities, organizational updates, and how best to communicate with research and field consultants. We bring the consultants to you and every ten minutes, the consultants will rotate from table to table to speak with you. We keep each rotation small and intimate to encourage candid conversations where your most pressing questions will be answered.

MODERATORS

Kartini Wilson
Managing Director, North American Consultant Relations
Man Group

Keith Wosneski
Senior Vice President, Senior Consultant Relations Officer
Acadian Asset Management LLC

SPEAKERS

Alex Bastin, CAIA
Fund Relationship Manager
Albourne America LLC

Paige Daniel
Partner
Highland Associates

Vincent Francom, CFA, CAIA
Senior Research Analyst
Verus

Ramon Gonzalez, CFA
Vice President
Wilshire Associates

Matt Mullarkey, CFA
Head of Advisory, Americas
Aksia

David Sancewich
Managing Director
Pension Consulting Alliance

Evan Scussel, CFA, CAIA
Head of Equity Investments
AndCo Consulting (formerly known as The Bogdahn Group)

Susanne Wei
Senior Associate, Hedge Fund Research
Cliffwater

Bryon Willy, CFA
Principal
Mercer

1:20–2:20 pm Networking Lunch with Exhibitors

Program and speakers subject to change. Visit http://www.aimse.org for updates.

HOTEL INFORMATION

FAIRMONT SCOTTSDALE PRINCESS
7575 East Princess Drive
Scottsdale, Arizona 85255
Phone 480.585.4848
Reservations 800.344.4758
Online https://resweb.passkey.com/go/aimse2017

The cut-off date to receive the AIMSE group rate is March 28, 2017

ROOM RATES & RESERVATIONS

AIMSE has contracted a discounted room rate of $309.00 per night for the conference. All reservations must be made directly with The Fairmont Scottsdale Princess. Sales agents are available by phone at 800-344-4758. Be sure to indicate that you are attending the Association of Investment Management Sales Executives Conference when making your reservation. You may also **book online at https://resweb.passkey.com/go/aimse2017**.

Rooms are reserved on a first come, first served basis. Reserve your room as early as possible to take advantage of the AIMSE group rate. **The cut-off date to receive the AIMSE group rate is March 28, 2017.**

GENERAL INFORMATION

NO SMOKING POLICY

Smoking is not permitted during any conference activity.

PRIVATE PARTY POLICY

Hosted parties in which attendance is restricted to either verbal or written invitations are not permitted at any AIMSE Conference.

ROOM DELIVERIES POLICY

Only exhibiting companies are permitted to conduct deliveries of promotional materials to AIMSE Conference attendees' rooms.

RECOMMENDED DRESS

All sessions and events are business casual.

TRAVEL INFORMATION

The airport nearest to the Fairmont Scottsdale Princess is:

- Phoenix Sky Harbor International Airport (PHX)

PARKING

Valet Parking: From $20 USD for overnight, including in-and-out privileges

Self Parking: $10 USD per night

ATTENDANCE POLICY

Only current paid AIMSE members are eligible to attend the AIMSE Annual Conference.

Please call the AIMSE office at 703-234-4098 to verify your membership status or to request a membership application.

Executive recruiters, consultants and members of the "working press" are not eligible for AIMSE membership and are therefore ineligible to attend AIMSE conferences.

AIMSE MEDIA POLICY

AIMSE does not issue media passes to any AIMSE conference or event. All media representatives must be current Associate members and pay the conference registration fees. All attendees must adhere to the AIMSE Media Policy. Exhibitor representatives MUST sign the Media Policy Agreement Form.

NAME BADGES

Badges are required for admittance to all conference general sessions, workshops/roundtables and social functions.

WORKSHOP/ROUNDTABLE REGISTRATION

Conference workshops and roundtables are limited in size and will be assigned on a first-come, first-served basis. Complete registration is essential to reserve your space in selected workshops/roundtables.

SPOUSE/GUEST REGISTRATION

The spouse/guest category is reserved for individuals who do not qualify for membership. All spouses/guests attending any AIMSE Annual Conference event must register. Workshop assignments will be handled on-site based on availability. Spouse/guest on-site registration is **$495**.

EXHIBITOR REGISTRATION

Please refer to the Sponsor & Exhibitor Prospectus for specific policies. All individuals attending the conference as exhibitors must submit registration forms and fees together. The exhibit fee allows four representatives from each exhibiting company to attend the AIMSE conference and participate in all activities, except sports events, at no additional cost.

Exhibitors interested in participating in conference sports events must pre-register and pay applicable fees. Additional exhibit staff members wishing to attend the Conference must pay the Extra Exhibitor Fee plus any sports or spouse/guest fees. These individuals must be current AIMSE members.

GOLF TOURNAMENT AND GOLF CLINIC REGISTRATION

Name badges are not required for the tournament or clinic. Attendees registered for the tournament or clinic will check in at the Golf Registration Desk. Please note the golf events sell out quickly. Submit your registration form as soon as possible to reserve a space.

GROUP DISCOUNTS

To receive the Group Registration Discount for two or more members attending from the same firm, all payments and completed forms for each individual must be sent to AIMSE together on the same business day. Please use a separate form for each registrant.

REFUNDS/CANCELLATIONS

Refunds will be granted by AIMSE for requests received in writing by April 1, 2017. An administrative fee of $250 will be assessed to all refunds of $500 or more. No refunds will be granted after April 1, but another AIMSE member from your firm may attend in your place. **All requests for refunds and/or transfers must be submitted in writing by the registered individual.** Refunds for sports tournaments will not be issued.

ATTENDEE LIST

Your registration must be received by April 1, 2017 for your name to appear in the printed list of conference attendees. Attendee lists will not be distributed prior to the conference.

ONLINE REGISTRATION

Online registration is preferred and available at **www.aimse.org**. You must log into your AIMSE website account to complete registration.

DEADLINES

Hotel Room Reservations:	**March 28, 2017**
Conference Registration Fee Discount:	**April 1, 2017**
Cancellation Refund Requests:	**April 1, 2017**
Printed Attendee List Registration Deadline:	**April 1, 2017**

For clarification on registration policies or to verify your membership status, call the AIMSE office at **703.234.4098**.

AIMSE REGISTRATION HOURS

Saturday, April 29:	**2:00 pm – 5:00 pm**
Sunday, April 30:	**4:00 pm – 8:00 pm**
Monday, May 1:	**7:00 am – 3:30 pm**
Tuesday, May 2:	**7:00 am – 1:30 pm**

REGISTRATION FORM

AIMSE MEMBER REGISTRATION FEES

EARLY BIRD REGISTRATION | ENDS APRIL 1

- ❍ AIMSE Member registration: $1845
- ❍ Two members from the same firm:* $1795 per person
- ❍ Three or more members from the same firm:* $1645 per person

REGISTRATION | AFTER APRIL 1

- ❍ AIMSE Member Registration: $1995
- ❍ Two members from the same firm:* $1945 per person
- ❍ Three or more members from the same firm:* $1895 per person

ON-SITE REGISTRATION

- ❍ AIMSE Member Registration: $2195

*In order to ensure that members registering from the same firm receive the discounted registration fee, all registration forms must be submitted on the same business day. Please note that discount refunds will not be issued.

EXHIBITOR REGISTRATION FEES

EARLY BIRD REGISTRATION | ENDS APRIL 1

Early Bird Registration | Ends April 1

- ❍ Exhibitor (If one of four booth reps.): $0
- ❍ Additional Exhibitor Staff (each): $1395

REGISTRATION | AFTER APRIL 1

- ❍ Exhibitor (If one of four booth reps.): $0
- ❍ Additional Exhibitor Staff (each): $1495

MEMBERSHIP DUES

Only current paid AIMSE Members are eligible to attend the conference. If you are unsure of your membership status, please call the AIMSE office at **703.234.4098**.

- ❍ Active Member Annual Dues: $350
- ❍ Associate Member Annual Dues: $450

Subtotal $____________

ENGAGE. GROW. SUCCEED.

BREAKOUT SESSION REGISTRATION

SUNDAY, APRIL 30

1:00 – 3:30 PM ❍ Boot Camp (Basic Program)

3:30 – 5:30 PM ❍ Boot Camp (Advanced Program)

Please select ***one*** specialized program track:

❍ Investor Track—Marketing to Consultants, Marketing to Endowments and Foundations

❍ Skills & Knowledge Track - Writing a Marketing Plan and Other Marketing Skills, Maximizing CRM and Performance Modeling

MONDAY, MAY 1 | 10:45 – 11:40 AM

CONCURRENT BREAKOUT SESSIONS

❍ Corporate Pension Plans – The Changing Landscape

❍ The Future of Public Pension Investing

2:30 – 3:25 PM

CONCURRENT BREAKOUT SESSIONS

❍ Insurance Investing – Key Considerations

❍ Managing Long-Term Endowments in the Midst of Uncertainty

TUESDAY, MAY 2 | 10:30 – 11:25 AM

CONCURRENT BREAKOUT SESSIONS

❍ Active vs. Passive Tug of War: Who Will Win?

❍ White Labeling and New Product Panel

Please print clearly. Complete a separate form for each registrant.

FULL NAME

JOB TITLE

BADGE / NICKNAME

FIRM

MAILING ADDRESS CITY STATE / PROVINCE ZIP / PC COUNTRY

PHONE FAX

E-MAIL

MENTOR PROGRAM

To assist newer AIMSE members attending the Conference, AIMSE is offering a mentoring program. If you would like a more experienced AIMSE member to share his/her insight at the conference, please check the appropriate box. If you would like to serve as a mentor to someone at the conference, please indicate by checking the appropriate box.

❍ I Would Like to Be an AIMSE Mentor

❍ I Would Like to Have an AIMSE Mentor

❍ I am attending my first AIMSE Annual Conference

Newcomers and those wishing to participate in the mentor program are encouraged to attend the Newcomer/Mentor Reception on Sunday.

OPTIONAL ACTIVITIES REGISTRATION

GOLF TOURNAMENT | Sunday, April 30

TPC Scottsdale – Stadium Course

7:00 am Breakfast & Registration

8:00 am Shotgun Start

12:00 pm Lunch

❍ $295 per person

**For club rental, please contact the Golf Course directly.*

YOUR NAME HANDICAP /AVERAGE SCORE

TEAM MEMBER 1

TEAM MEMBER 2

TEAM MEMBER 3

Please include team members upon registration or email info@aimse.org.

All team members must register for the tournament independently. Requesting team members here does not register them to play in the tournament. Space is limited. Please register immediately to reserve your space. Golf team assignments will be made according to handicap or average score unless you request a team assignment.

GOLF CLINIC | Sunday, April 30

TPC Scottsdale

10:00-11:30 am Clinic

12:00 pm Lunch

❍ $145 per person

TENNIS TOURNAMENT | Monday, May 1

4:30 pm

❍ $90 per person

**Tennis facilities are located at Sanctuary Resort at Camelback Mountain. Transportation will be provided for participants. Transfer time from Fairmont is 20-30 minutes.*

VOLLEYBALL TOURNAMENT | Monday, May 1

4:30 pm

❍ $70 per person

TOURNAMENT POLICIES

- Registration for Tournaments and Optional Activities will not be processed until fees are paid.
- Refunds will not be issued for cancellations of Optional Activities.

I agree and acknowledge that I am undertaking participation in AIMSE sports as my own free and intentional act and I am fully aware that physical injury might occur to me as a result of my participation in AIMSE sports. I give this acknowledgment freely and knowingly and I represent and warrant to you that I am physically and mentally fit and that I am, as a result, able to participate in AIMSE sports, and I do hereby assume responsibility for my own well-being. You must sign this agreement in order to be registered for any of the tournaments.

SIGNATURE

YOUR NAME DATE

SPOUSE/GUEST REGISTRATION

❍ $395 | Ends April 1

❍ $495 | After April 1

Spouses/guests must have a name badge to attend meal functions, general sessions and workshops. Complete the following as you would like your spouse/guest badge to appear:

SPOUSE/GUEST NAME

SPOUSE/GUEST BADGE INFORMAL/FIRST NAME   SPOUSE/GUEST OF

- Spouse/guest fee includes all meal functions, all general sessions, and entry into available workshops.
- Any spouse/guest who does not pre-register prior to the conference and wishes to participate in any conference activity must pay an on-site registration fee of $495.
- Please note that children are not encouraged to attend any AIMSE functions.

Tournament/Spouse/Guest Subtotal $____________

METHOD OF PAYMENT

Payments must be made in US Dollars

Total Amount $____________

Please print clearly:

❍ Check Enclosed (payable to AIMSE)

❍ Credit Card

Please charge:

❍ Mastercard ❍ Visa ❍ American Express

CARD NUMBER   EXPIRATION

SIGNATURE   CVV

If you have any physical needs, dietary restrictions or require other special accommodations in order to participate, please specify:

ENGAGE. GROW. SUCCEED.

Submit Registration Forms and Payment to:

AIMSE
11130 Sunrise Valley Drive, Suite 350
Reston, Virginia 20191
Phone | 703.234.4098
Fax | 703.435.4390
info@aimse.org

SAVE THE DATE

AIMSE

11130 SUNRISE VALLEY DRIVE, SUITE 350
RESTON, VIRGINIA 20191
PHONE: 703.234.4098
INFO@AIMSE.ORG