

the professional body for
through-life management of physical assets



2023 Annual General Meeting

January 12, 2023

Agenda



- Call Meeting to Order / Welcome
- IAM USA Chapter 2022 Update
- IAM USA Chapter Committee
- Objectives, Goals & Targets for 2023
- Close the Meeting

USA Chapter 2022

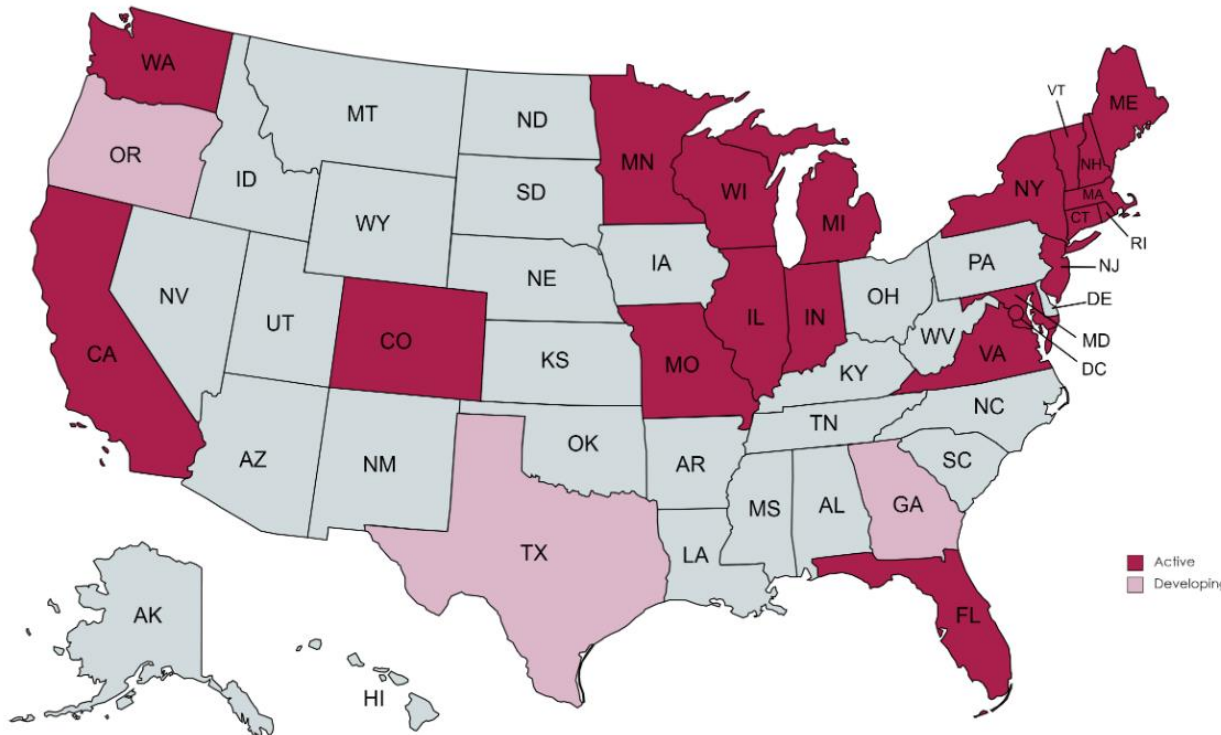
Total of 15 Branches

11 Active Branches:

- Colorado
- South Florida
- Great Lakes
- Minnesota
- New England
- New York / New Jersey
- Pacific NW
- Southern California
- San Francisco
- St. Louis
- Washington DC / Maryland / Virginia

4 Developing Branches:

- Atlanta
- Austin
- Houston
- Oregon



Providing recognition for the Individual Journey



Membership Levels

	Student – actively studying asset management	→ 3 in the USA (+3)
	Associate – no prerequisites	→ 295 in the USA (+121)
	Member (MIAM) – experience and Proposer support required	→ 46 in the USA (+4)
	Fellow (FIAM) – leadership experience and two Proposers required	→ 8 in the USA (+1)

171 (-27)
passed IAM Certificate in the USA
(600 since 2019)

19 (+10)
passed IAM Diploma in the USA
(36 since 2019)

10 (+3)
Registered Asset Management Professionals in the USA

32 Meetings in 2022 (+8)



- Colorado – January, April, July, October
- South Florida – March, June, October, December
- Great Lakes – September, October, December
- Minnesota – February, May, September, December
- New York/New Jersey – November
- Pacific NW – May, August
- SoCal – April, August, December
- San Francisco – April, October
- St. Louis – December
- Washington DC / Maryland / Virginia – February, May, August, November

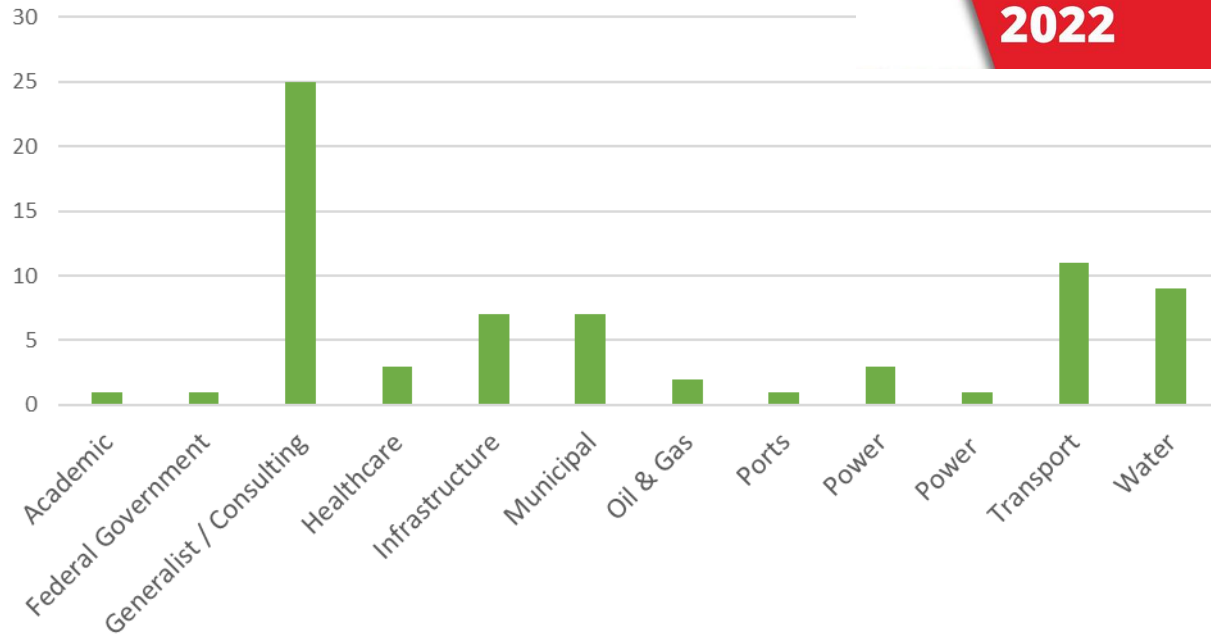
- NxtGen – February, June
- Women in Asset Management (WiAM) – May, October

2022 North American Conference



Asset Management's Golden Era

- 226 delegates from North America and beyond
- 14 sponsors
- 120 abstracts submitted from 90 applicants
- 72 speakers from 12 sectors



Mentor Program



2022 pilot program was a success

- 11-month program (December – October)
- 7 mentors (from US, Canada and UK)
- 16 mentees (from US, Canada and New Zealand)
- 3 sessions for the entire cohort
 - Purpose of Mentorship
 - Asset Management Career Journeys
 - Workplace Bias in Asset Management



**2023 enrollment is open
through January 31**



US Chapter Committee



Tammy Whipple
Chair
(2023)



Mark Knight
Deputy Chair
(2023)



Joe Mooney
(2023)



Katterinne Fleming
(2024)



Tom Myers
(2023)



David Kraft
(2024)



Andrew Ardrey
(2024)



George Galambos
(2024)

2023 Goals



- 1. Grow and Support Branches**
- 2. Develop and Promote Asset Management Knowledge**
- 3. Grow the IAM USA Chapter and Support Diversity, Equity and Inclusion (DEI) and Nxt Gen**
- 4. Obtain IAM USA Chapter Non Profit Legal Status**

2023 Goals and Activities



	Grow and Support Branches	Develop and Promote AM Knowledge	Grow Chapter & Support DEI and Nxt Gen	Obtain Non-Profit Legal Status
Activities	Update branch lead tool kit	Develop series of 3 webinars	Support IAM Global DEI Initiatives	Review history of IAM USA steps taken to achieve legal status
	Host 2 joint nationwide branch meetings	Support mentorship program	Support WIAM	Identify requirements to obtain non profit legal status in US
	Support branch communications	Develop syllabus and tool kit for promoting AM college programs	Identify strategies to promote Nxt Gen involvement in chapter and branches	Develop work plan to obtain legal status including steps and timeline
	Support branch development and needs	Develop 1-3 papers/case studies	Develop IAM USA Value Proposition	Make changes as needed to current USA Board to support legal entity
	Develop content for branch meetings	Advertise opportunities for consuming AM knowledge	Develop series of events and webinars free to members	Open IAM USA bank account
Outcomes	2 New Branches in 2023	Provided 3 webinars	Membership is doubled (target 600+)	Non-Profit Legal Status
	Every Branch Hosts at Least 2 Meetings	College Curriculum Tool Box is Developed	Nxt Gen are involved in branch and chapter initiatives	Independent IAM USA bank account
	Branches have an updated toolkit and content to support meetings	1-3 papers/case studies are published	DEI is supported	IAM USA progress towards chapter readiness per IAM's Transform22 initiative

2023 USA Subcommittees



- Events (North American Conference, Webinars)
 - Tammy Whipple & Joe Mooney
- Branches & Membership
 - George Galambos & Andrew Ardrey
- Knowledge Development
 - Mark Knight & Tom Myers
- College Curriculum
 - Amy Lindblom & Mark De Clerq
- Diversity, Equity & Inclusion (DEI) including WiAM & Nxt Gen
 - Katterinne (Katty) Fleming

Q&A