

*"I've **built relationships** with individuals from several organizations who I now feel comfortable contacting for any reason. We've collaborated on issues ranging from technology to operations. At a recent **NICSA General Membership Meeting**, I learned valuable information about SMART automation that I took to my company, and I worked through related issues with individuals I met through the panel discussion."*

Chris Trede  
Senior Vice President  
American Funds Service Company

*"NICSA has helped shape my career. I've been able to develop a **strong industry network**, and valued relationships through my involvement with various committees, conferences, and my current role on the NICSA board."*

Anne Hebard  
Managing Director  
Boston Financial Data Services



## AN ASSET MANAGEMENT ASSOCIATION FOR ALL

Deep expertise and unique perspectives come together in an open and collaborative environment to tackle the strategic implementation of the asset management industry's most vital issues.

## DEVELOP, SHARE AND ADVANCE LEADING PRACTICES

NICSA provides industry executives the tools to **gain industry knowledge** and **make informed decisions** about strategic business development and best practice implementation.

- » **Formal education programs** that provide collaborative insights from diverse perspectives
- » **Interactive forums** that allow members to exchange ideas and business solutions
- » **Networking opportunities** that connect members from all segments of the financial industry

## DIVERSE PERSPECTIVES

The Association enjoys a **broad membership**, including asset management firms, broker dealers, banks, and an extensive assortment of professional service firms that support the industry.

## IMPACTFUL MEMBER CONTRIBUTION

**NICSA's thought leadership programs are driven largely by members for members.** NICSA supports a wide variety of topic and event committees; smaller committee sizes (approximately 25 members) allow our volunteers to have impactful participation, make meaningful contributions, and have their voices be heard. Committee membership is open to all employees of NICSA member firms.

**To become a member, contact**

**Anne De May** Vice President of Membership  
ademay@nicsa.org | 508.409.6861

*“NICSA webinars are an effective and efficient way for leaders in my firm to learn about industry best practices and develop business insight. We often gather our executives internally to participate, debrief, and decide how to leverage what we’ve learned in order to drive our business forward.”*

Ian McCoy  
Senior Vice President  
Franklin Templeton Investments



## KEY BENEFITS

### Industry Intelligence

NICSA reports on diverse topics that support the advancement and betterment of investment product offerings, shareholder services, and fiduciary standards. Members have access to an extensive database of reference materials—including white papers, surveys, conference archives, articles, and more—through the **NICSA Knowledge Center** via our **Member Portal**.

### Free Webinars

Regularly scheduled, practically-focused webinars presented by prominent industry experts are offered throughout the year to all staff of NICSA member firms on a variety of topics and functions.

### Employee Education and Training

NICSA is registered with the National Association of State Boards of Accountancy (NASBA) and proudly offers continuing education credits as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

### National Conferences and Regional Meetings

NICSA provides education and networking opportunities through two national conferences, the General Membership Meeting (GMM) and Strategic Leadership Forum (SLF).

In addition, NICSA hosts conveniently located Regional Meetings throughout the year that offer a smaller venue in which members take a deeper dive into select topics.

### Networking and Collaboration

NICSA offers opportunities to interact with industry peers in a setting that is conducive to idea sharing and collaboration.

### Leadership Opportunities

Any employee from NICSA member firms may volunteer for committee membership or leadership roles.

### Scholarship Programs

Children of employees of NICSA member companies are eligible to apply for the **Blackwell Scholarship Program**, a program designed to support students pursuing degrees in the asset management industry.

**For more information on NICSA membership**, contact Anne De May, Vice President, Membership at [ademay@nicsa.org](mailto:ademay@nicsa.org).

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