



SIO Professional Member Package

Providing you with the full range of SRI information, networking, marketing and branding services in one cost-effective package

Marketing and Branding

- Professional Members receive prominent placement in the **SRI On-Line Directory**, Canada's only Internet directory of SRI services. This listing identifies you as a leading provider of SRI services in Canada. SIO Professional Members recommend this as a leading source for client referrals.
- SIO Professional Members are eligible to identify themselves as SIO members, having agreed to the *SIO Statement of Standards for SRI Financial Advisors*. SIO membership gives you the right to use the SIO member logo on your marketing materials and agreement with this statement distinguishes you as a provider of SRI services.
- SIO also provides Professional Members with the **SRI Point-of-Sale Package**, comprised of marketing and educational materials (generic versions suitable for customization), providing practical support for professionals working directly with clients.

SRI Information

- Professional Members receive the **monthly SIO News Digest**, an invaluable sources of SRI news, information and analysis, distributed direct to your email address.

Next

- Professional Members also gain access to **SRI Staff**. SIO staff are available to handle specialized information requests by phone or email - helping you track down key SRI-related facts and figures for reports and key client presentations.

Professional Development Training

- Exclusive invitations to our annual **Advisor Dinners**, held in Calgary, Winnipeg, Ottawa, Montreal, Toronto and Vancouver.
- Significant discounts to SIO-sponsored and affiliated events, such as **the Canadian Responsible Investment Conference, sponsored by the SIO**.

Networking and Contact Development

- SIO-Advisor members are subscribed to the **SIO-Professionals Listserve** allowing you and your associates to connect with other industry professionals to share information and discuss industry developments. Advisor-members are also subscribed to the **SIO-Advisors Listserve**, which connects advisors across Canada on SRI issues.

Costs and Benefits: Delivering Bottom-Line Value

The SIO Professional Membership package, at \$350, will provide an invaluable role in your client development strategy – providing practical benefits and value, yet at a fraction of what is often spent on related research and networking.

For more information:

Eugene Ellmen
Executive Director
Social Investment Organization
184 Pearl St. 2nd floor
Toronto Canada M5H 1L5
ellmen@socialinvestment.ca
www.socialinvestment.ca