



2009-10 SIO Associate Member Package

Associate Membership provides asset management firms, financial institutions, institutional investors, investment consultants and fund companies with a full range of information, networking, marketing and branding services in one cost-effective package.

Industry Information and Market Intelligence

- Associate Members receive the **SIO Listserve**, allowing you and your associates to stay abreast of critical industry developments. Associate members are eligible to post their own news releases on this listserv, which now reaches more than 450 SRI leaders across Canada.
- Associate Members receive the monthly **SIO News Digest** on news and developments, delivered to as many staff as needed by email.
- Associate Members receive the **SRI Policy Alert**, an occasional policy briefing on major public policy issues involving SRI in Canada. This report focuses on critical emerging public policy issues of interest to our members.
- Associate Members also gain access to **SIO staff**, who 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.

Brand Reinforcement and Marketing

- SIO Associate Membership is a strong indicator of your company's commitment to the practice of socially responsible investment and the SRI industry. SIO Associate Members are entitled to use the **SIO Associate Member Logo** on their marketing materials.

- Associate Members receive logo recognition on socialinvestment.ca, **the only SRI industry-wide website in Canada**. Search engines identify socialinvestment.ca as one of the highest-ranked websites out of more than six million internet sites in the world containing the term “socially responsible investment.”
- Mutual fund companies that are Associate Members receive a listing in the **SRI Mutual Fund Directory**, a national guide to SRI mutual funds for investment advisors and investors.
- SIO Associate Members receive a listing in the **SRI Institutional Investment Directory**, the definitive listing in Canada of SRI service providers to institutional investors. This Directory is distributed to the top 50 investment consultants. The Report is also available to the public through our website.

Professional Development Training

- Associate Members have access to receive the presentation, **SRI in Canada**, an overview of SRI issues. SIO can deliver this presentation directly to your staff or clients at no charge, except for travel and accommodation expenses.
- Associate Members have access to **Fundamentals of SRI for Advisors**, a two-hour accredited training program for advisors developed in partnership with Advocis. This is ideal for staff training of financial advisors.

Networking and Contact Development

- Associate Members receive 25% discounts on sponsorship of the **Canadian Responsible Investment Conference**, the national conference on SRI. The next conference is scheduled to be held in Toronto in June, 2010. These highly-successful conferences are ideally suited to help develop and nurture new industry contacts and client leads.
- Associate members are invited to sponsor our annual **SRI Advisor Marketing Dinners**, held in six cities across Canada each January. This series reaches more than 150 prime SRI-advisors across Canada.

Costs and Benefits: Delivering Bottom-Line Value for your company and its related brands

The SIO Associate Membership package is \$5,000 annually.

SIO makes it affordable for you to convey these benefits to related brands or business units. Associate Members are able to include up to two additional related brands or business units as additional associate members until the end of 2009 at no additional cost.

In 2010, additional brands or business units will cost \$1,500 for the first additional brand and \$1,000 for each additional brand after that. Each brand or business unit is considered a separate member.

For more information

Associate membership in the SIO will play an invaluable role in your SRI strategy – providing practical benefits and value, yet at a fraction of what is often spent on related research, conferences, seminars and networking.

For more details, contact **Eugene Ellmen, Executive Director, at 416-461-6042 or ellmen@socialinvestment.ca**.