



SIO Supporting Member Package 2009-10

SIO's Supporting Member package provides fund companies, financial institutions and asset management firms with recognition as a major player in the socially responsible investment industry in Canada. Your Supporting Membership is a demonstration of your company's commitment to SRI in Canada. As a senior member of the SIO, the Supporting Membership entitles your company to the full range of our services, including information, networking, marketing, branding, policy and advocacy.

If you choose to support the SIO for a three-year period at this level, your company then qualifies for Sustaining Membership, reserved for companies demonstrating long-term support of the organization.

In return for this substantial contribution to the organization, SIO pledges to deliver the following:

Brand Reinforcement and Marketing

- As a Supporting Member, you are entitled to use the **SIO Supporting Member Logo on your marketing materials**. This recognition will help to brand your company as a significant player in SRI in Canada.
- As a Supporting Member, you receive **recognition in SIO's electronic newsletters, and a dynamic logo on www.socialinvestment.ca**, further branding your company as a significant contributor to the SRI industry. Socialinvestment.ca is **one of the highest ranking websites out of more than one million internet sites** worldwide on the topic of socially responsible investment.
- Mutual fund companies that are Supporting Members receive a listing in the **SRI Mutual Fund Directory**, a national guide to SRI mutual funds for investment advisors and investors.
- Supporting Members receive a listing in the **SRI Institutional Investment Directory**, the only directory available in Canada providing detailed information on SRI service providers. This report is distributed to more than 50 of the top investment consultants in Canada. This identifies you as a major provider of SRI services to the institutional sector.

Industry Information and Market Intelligence

- Supporting Members are provided with bulk subscriptions to **SIO's News Digest**, a monthly summary of SRI news for your staff. This is provided in an easily accessible email format.
- Supporting Members receive the **SRI Policy Report**, a periodic bulletin on emerging policy developments in SRI.
- Supporting Members also gain access to **SIO Staff**, who are available to handle specialized information requests by phone or email - helping you resolve contentious issues or track down key SRI-related facts and figures.

Professional Development Training

- Supporting Members are eligible to call upon SIO staff to conduct **SRI training workshops** (which are eligible for continuing education credits) for staff. This is provided at no cost except for travel and accommodation expenses. This includes the newly-released **SRI Advisor Training Program**, which was recently developed by SIO in 2009.
- Supporting Members with financial advisors on staff are eligible for major discounts on **SIO Professional Membership** for advisors, currently valued at \$350 each, thereby enhancing internal professional development.

Networking and Contact Development

- Supporting Members and their staff are eligible to subscribe to the **SIO Listserve** allowing you and your associates to connect with SIO-member advisors on product announcements, news releases and other critical information.
- Supporting Members receive sponsorship opportunities, discounts on registrations and free exhibit space at SIO events. As well, all staff of SIO Supporting Members receive discounts to SIO-affiliated events, including the **Canadian Responsible Investment Conference**, to be held in Toronto in June 2010. These events are ideally suited to help develop and nurture new industry contacts and client leads.
- Supporting Members will also be invited to invited to sponsor other major events in 2009-10, including the 2010 Advisor Dinner Series, to be held in January and February, 2010 in Victoria, Vancouver, Calgary, Winnipeg, Toronto, Ottawa and Montreal.

Policy and Advocacy

- Supporting Members have input into the **Policy and Advocacy** activities of the organization, helping to shape SIO's efforts to create a tax, regulatory and legislative environment eliminating barriers to SRI development.

Costs and Benefits: A demonstration of your company's commitment

The cost for the SIO Supporting Membership is \$15,000 annually. The SIO Supporting Membership package is a show of support of your company's commitment to SRI in Canada as well as a useful toolkit of services to help your company succeed in this growing market.

SIO makes it affordable for you to convey these benefits to related brands or business units. Supporting 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, call Eugene Ellmen, Executive Director, at 416-461-6042 or ellmen@socialinvestment.ca.