



## ***SIO Sustaining Contribution Package 2012***

SIO's Sustaining Contribution 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 Sustaining Contribution helps to shape the development of the SRI agenda in Canada, as well as signaling that your company is a significant and long-standing contributor to the SRI industry. SIO Sustaining Membership is open to SIO members that have been with the organization for at least three years. As a top-ranking member of the SIO, the Sustaining Contribution package entitles your company to the full range of our services, including information, networking, marketing, branding, policy and advocacy.

Sustaining Members play a special role in the organization. The contribution of the Sustaining Members is critical in providing a stable and long-lasting funding base for the operations of the SIO. Sustaining Member contributions are used to directly fund the operating requirements of the organization.

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

### ***Brand Reinforcement and Marketing***

- As a Sustaining Member, you are entitled to use the **SIO Sustaining Member Logo on your marketing materials**. This recognition will help to brand your company as a significant player in SRI in Canada.
- As a Sustaining Member, you receive **recognition in SIO's electronic newsletters, and a dynamic logo on [www.socialinvestment.ca](http://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 hundreds of thousands of internet sites** worldwide on the topic of "socially responsible investment."
- Sustaining 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.

### ***Related Memberships***

- Sustaining Members are eligible to name related business units as Associate Members, without additional cost. This further defines your organization as a business group committed to SRI.

### ***Industry Information and Market Intelligence***

- Sustaining 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.
- Sustaining Members receive the **SRI Policy Alert**, an occasional bulletin on emerging policy developments in SRI.
- Sustaining 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***

- Sustaining 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.

### ***Networking and Contact Development***

- Sustaining Members and their staff are eligible to subscribe to the **SIO Listserve** allowing you and your associates to connect with other industry professionals to share information and discuss industry developments.
- Sustaining Members receive sponsorship opportunities, discounts on registrations and free exhibit space at SIO events. This includes the **Canadian Responsible Investment Conference**. The next conference is scheduled to be held in Montreal in June, 2012.

### ***Policy and Advocacy***

- Sustaining 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.

### ***Strategic Direction***

- Sustaining Members play a vital role in helping to shape the direction of the SRI industry. Sustaining members are eligible to appoint a representative to sit on the Board of Directors of the SIO, and to participate in annual Sustaining Members meetings to consider the strategic position of the industry.

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

The cost for the SIO Sustaining Contribution package is \$15,000 annually. The SIO Sustaining Contribution 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.

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