



# 2023 IIAC AFFILIATE PROGRAM



INVESTMENT INDUSTRY  
ASSOCIATION OF CANADA



# ASSET. ALLY. ADVOCATE.

The Investment Industry Association of Canada (IIAC) is the leading national association representing investment firms that provide products and services to Canadian retail and institutional investors.

Our members manufacture and distribute a variety of securities such as mutual funds and other managed equity and fixed income funds and provide a diverse array of portfolio management, advisory and non-advisory services.

Our members trade in debt and equity on all marketplaces, provide carrying broker services and underwrite issuers in public and private markets. They operate in Canadian and global capital markets.

The IIAC represents financial services firms of every size and type including Canadian bank owned dealers, independent and foreign dealers. Through active committee work, regulatory and government submissions, and relations, and thought leadership, we are a strong voice for current and future issues that matter and contribute to vibrant, compliant capital markets that create jobs and investor benefits.

We work with domestic and international exchanges, market intermediaries, government and regulatory bodies, educational institutions, and other professional associations.

The IIAC also provides:

- A forum for industry stakeholders to come together to discuss and address current and emerging issues impacting efficient, informed, and compliant markets and its investors.
- Education and continuing education conferences and seminars for CE credit.
- Industry data, tools, templates, surveys, and practical resources.

The IIAC is a member of the International Council of Securities Associations (ICSA).



## **GROW WITH US.**

IIAC Affiliates are include key members of, or service providers to, the financial services industry. The IIAC Affiliate Program is designed to raise your profile, knowledge base and access. The affiliate levels are tiered with each level providing an enhanced level of participation in IIAC activities and interaction with our Members and Affiliates

	Platinum Affiliate	Gold Affiliate	Silver Affiliate	Bronze Affiliate
IIAC Committees and Working Groups	Fully participate in IIAC Committees and Working Groups	Engage with selected IIAC Committees and Working Groups	Invitation to observe selected IIAC Committees and Working Groups	N/A
Event Sponsorship	Allowance of \$15,000	Allowance of \$10,000	Allowance of \$3,500	N/A
Event Speaker Invitations	Yes	Yes	Yes	N/A
Complimentary Event Registrations	6 Tickets	4 Tickets	N/A	N/A
Author Thought Leadership	Yes	Yes	N/A	N/A
Targeted Introductions	Yes	N/A	N/A	N/A
Attendee Marketing Opportunity	Attendee Information + One Email from Affiliate	Email on Behalf of Affiliate	N/A	N/A
Identification on IIAC Website	Yes	Yes	Yes	Yes
Promotion in IIAC Weekly Newsletter	4 Per Year	3 Per Year	2 Per Year	2 Per Year
Member Centre	Yes + Exclusive Resources & Partner Offers	Yes + Exclusive Resources & Partner Offers	Yes + Exclusive Resources & Partner Offers	Partner Offers Only

# PLATINUM AFFILIATE

## **Participation in IIAC Committees and Working Groups<sup>i</sup>**

Opportunity to fully participate in IIAC Committees and Working Groups within the area of interest and expertise of the Platinum Affiliate to both contribute thought leadership and expertise and gain industry intelligence and insights.

## **Event Sponsorship**

Allowance of \$15,000 to be used towards sponsorship opportunities available at IIAC conferences, events, and virtual events (webinars).

## **Event Speakers**

Invitation for subject matter experts from the Platinum Affiliate to speak at IIAC conferences, events, and virtual events to showcase thought leadership and expertise to IIAC Members.<sup>ii</sup>

## **Complimentary Event Registrations**

Six complimentary registrations annually.<sup>iii</sup> This is supplemental to registrations associated with event sponsorship(s).

## **Thought Leadership**

Opportunity to author white papers on issues of importance to the industry which will be distributed to member firms and posted on the IIAC website.<sup>iv</sup>

## **Targeted Introductions**

Introductions to key individuals at Committees and Working Groups and events where the Platinum Affiliate was the presenting sponsor or a supporting sponsor.

## **Attendee Marketing Opportunity**

For each IIAC event that they sponsor, a Platinum Affiliate receives the list of attendees who have consented to provide name, firm, title and e-mail address for use in a one-time e-mailing.<sup>v</sup>

## **Identification on IIAC Website**

Identification as a Platinum Affiliate on the IIAC website and a link to the Affiliate's website.

## **Promotion in IIAC Weekly Newsletter**

Maximum four times a year consisting of logo and company overview or product sheet.

## **Member Centre**

Access to the Members only section of the IIAC website including exclusive resource material and IIAC partner offers.

# GOLD AFFILIATE

## **Engagement in IIAC Committees and Working Groups**

Opportunity to engage with selected IIAC Committees and Working Groups within the area of interest and expertise of the Gold Affiliate to both contribute thought leadership and expertise and gain industry intelligence and insights.

## **Event Sponsorship**

Allowance of \$10,000 to be used towards sponsorship opportunities available at IIAC conferences, events, and virtual events (webinars).

## **Event Speakers<sup>vi</sup>**

Invitation for subject matter experts from the Gold Affiliate to speak at selected IIAC conferences, events, and virtual events to showcase thought leadership and expertise to IIAC Members.

## **Complimentary Event Registrations**

Four complimentary registrations annually.<sup>vii</sup> This is supplemental to registrations associated with event sponsorships.

## **Thought Leadership**

Opportunity to author white papers on issues of importance to the industry which will be posted on the IIAC website.<sup>viii</sup>

## **Attendee Marketing Opportunity**

For each IIAC event that a Gold Affiliate sponsors, the IIAC will send an e-mail on behalf of our Gold Affiliate to all attendees.<sup>ix</sup>

## **Identification on IIAC Website**

Identification as a Gold Affiliate on the IIAC website and a link to the Affiliate's website.

## **Promotion in IIAC Weekly Newsletter**

Maximum three times a year consisting of logo and company overview or product sheet.

## **Member Centre**

Access to the Members only section of the IIAC website including exclusive resource material and IIAC partner offers.

# SILVER AFFILIATE

## **Observation in IIAC Committees and Working Groups**

Invitation to observe selected IIAC Committees and Working Groups within the area of interest and expertise of the Silver Affiliate on specific topics to gain industry intelligence and insights.

## **Event Sponsorship**

Allowance of \$3,500 to be used towards sponsorship opportunities available at IIAC conferences, events, and virtual events (webinars).

## **Event Speakers\***

Invitation for subject matter experts from the Silver Affiliate to speak at selected IIAC conferences, events, and virtual events to showcase thought leadership and expertise to IIAC Members.

## **Member Rate Event Registrations**

Silver Affiliates benefit from the reduced Member rate for any public IIAC event. The registration can be used by employees, clients or prospective clients at the discretion of the Affiliate.

## **Identification on IIAC Website**

Identification as a Silver Affiliate on the IIAC website and a link to the Affiliate's website.

## **Promotion in IIAC Weekly Newsletter**

Maximum two times a year consisting of logo and company overview or product sheet.

## **Member Centre**

Access to the Members only section of the IIAC website including exclusive resource material and IIAC partner offers.

# BRONZE AFFILIATE

## **Event Sponsorship**

Priority consideration of sponsorship opportunities available at IIAC conferences, events, and virtual events (webinars).

## **Member Rate Event Registrations**

Bronze Affiliates benefit from the reduced Member rate for any public IIAC event. The registration can be used by employees, clients or prospective clients at the discretion of the Affiliate.

## **Identification on IIAC Website**

Identification as a Bronze Affiliate on the IIAC website and a link to the Affiliate's website.

## **Promotion in IIAC Weekly Newsletter**

Maximum two times a year consisting of logo and company overview or product sheet.

## **Member Centre**

Access to IIAC partner offers.



# ENDNOTES

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<sup>i</sup> Specific IIAC Committee and Working Group participation at the discretion of the IIAC.

<sup>ii</sup> Speaker invitations at the discretion of the IIAC.

<sup>iii</sup> Complimentary tickets are not transferrable. Two complimentary pass limit for a single event.

<sup>iv</sup> Subject of white paper to be agreed upon in advance. White paper must be educational in nature and not a marketing document. IIAC reserves final editorial rights.

<sup>v</sup> Contents of e-mail subject to pre-approval by IIAC

<sup>vi</sup> See footnote ii.

<sup>vii</sup> See footnote iii.

<sup>viii</sup> See footnote iv.

<sup>ix</sup> Contents of e-mail subject to pre-approval by IIAC. Mailing will indicate to contact the Gold Affiliate directly for more information.

<sup>x</sup> See footnote ii.