IFIC

THE INVESTMENT FUNDS INSTITUTE OF CANADA | L'INSTITUT DES FONDS D'INVESTISSEMENT DU CANADA

It's your money. Find out more.

A Toolkit for Dealers and Advisors

I READ MINE • JE LIS MON RELEVÉ

The Investment Funds Institute of Canada has created this toolkit to help advisors engage with clients about the new information investors will receive about the performance of their investments and the fees they paid to their dealer under the initiative known as "CRM2".

The materials in this toolkit were created to encourage investors to open their statements and read the new information. The toolkit contains the following materials in English and French:

- **A sample client email/letter** (*see page 2*) that you can tailor and send to your clients to introduce the new reports.
- **Sample tweets** (*see page 3*) using the hashtags #FindOutMore and #IReadMine to help you engage with your followers in real time.
- **Tips on talking to your clients** about their new reports (*see page 4*).
- **A wordmark that can be adapted to your firm's colours** and included in print and electronic communications and marketing materials. download
- **A social media badge that can be adapted to your firm's colours** that investors can include in their profile pictures on social media. download

Firms can customize the artwork with your company colours using source files for the wordmark and the badge. Log onto Twibbon through your company's Twitter handle to upload your custom badge and share the campaign with your networks. Alternately, click here to simply add the IFIC badge to your profile picture and help spread the word.

Advisors can participate in this effort by including the badge on your own profile picture and encouraging your clients to open their statements and to post the badge on their pictures. You can use the badge in your firm's colours if available or click here to access IFIC's badge. You can also use this material to open a conversation to help clients better understand how their investments have performed and the fees that they pay. Please let us know how your firm is using these materials by contacting Pira Kumarasamy, Communications Consultant, IFIC (pkumarasamy@ific.ca)

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Sample Letter/Email to Clients

Dear Ms. Doe,

The start of a new year is the perfect time to review your finances, and this year you will have new information to help you learn more. The statement that you receive from our firm this month includes **two new reports** about the performance of your investments and the fees that you paid over the past year.

Please be sure to review this new personalized information, as it will increase your understanding about your investments as you plan for the future.

To encourage all of our clients to review the new information, I invite you to add the "I Read Mine" badge (available here) to your Twitter or Facebook profiles and to tweet or post that you have read the materials using the hashtags #IReadMine and #FindOutMore.

If you have questions about the reports, please do not hesitate to contact me. I would be happy to meet with you to answer any questions that you may have.

It's your money. Find out more!

Sincerely,

[NAME OF ADVISOR]

Sample Tweets

Advisors and dealers are encouraged to tweet these messages.

Have you opened your investment statement? Add the badge to your profile to let us know: goo.gl/9ONt5I #IReadMine #FindOutMore

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It's your money. Find out more! Open your statement and post the badge: goo.gl/9ONt5I #IReadMine #FindOutMore

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New reports = new info about your investments. Open your statements and make an appointment to #FindOutMore #IReadMine

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Curious about the performance of your investments? New info is included in your statements. It's your money #FindOutMore #IReadMine

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It's a new year! Take a fresh look at your #finances with your #advisor. #FindOutMore #IReadMine

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Buying an #RRSP? Meet with your financial #advisor and #FindOutMore: check new info on your investments this month #IReadMine

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Did you know? Your statements this month include new info about your #investments and #fees. It's your money. #FindOutMore #IReadMine

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Plan for your future #financial #security. Open your statement for new info about your #investments. #IReadMine #FindOutMore

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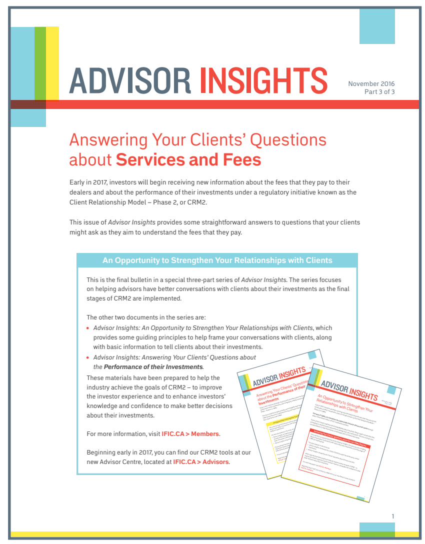
Talking to Your Clients about Their New Reports

The purpose of CRM2 is to increase investor knowledge and engagement. In doing so, it will create opportunities for advisors to strengthen client-relationships through better conversations about fees and performance. For tips and insights in how to discuss the content of the new reports with your clients, take a look at these recent publications:

Advisor Insights: An Opportunity to Strengthen Your Relationships with Clients

Advisor Insights: Answering Your Clients' Questions about the Performance of their Investments



Advisor Insights: Answering Your Clients' Questions about Services and Fees

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