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

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A Toolkit for Dealers and Advisors

In the first half of 2018, dealer firms will be sending investors their second annual personalized reports on fees and performance.

Research by the British Columbia Securities Commission released this fall found that investors' knowledge of fees has increased since the first CRM2 reports were issued, especially among those who were less familiar with fees before receiving their reports. The industry can take pride in this strong initial outcome. Our next task is to improve on the Year 1 results by continuing to increase investor understanding each year by encouraging clients to read their statements and to talk to their advisors regularly about their accounts. Continued improvement in investor knowledge and engagement will demonstrate that disclosure is an effective way to inform investors so that they can make better financial decisions.

The materials in this toolkit provide dealers and advisors with tips and content to encourage clients to open their reports and read their personalized information. The toolkit, which has been updated since we originally circulated it in 2016, 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 familiarize them with the cost and performance 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. For example, it could be printed on the envelopes that contain your clients' reports or pasted into your email communications or newsletters.

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IFIC will make the source files for the workmark available to your firm if you would like to customize the artwork with your company colours.

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. To help you in this process, we are pleased to enclose **two reports**, personalized for you, about the performance of your investments and the fees that you paid over the past year.

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

The investment funds industry ‘s goal is to continue to increase investor understanding of performance and fees by encouraging investors to read their reports. To support this effort, I invite you to tweet your post on other social media that you have read your reports and encourage other investors to review theirs. using the hashtags #IReadMine and #FindOutMore.

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

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Sincerely,

[NAME OF ADVISOR]

Sample Tweets

Advisors and dealers are encouraged to tweet these messages.

Have you opened your investment statement? Check out two reports prepared just for you on fees and performance. #IReadMine #FindOutMore

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New year = 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? This 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

Tweets are also available in French at **IFIC.CA > Members**.

This material is part of a campaign launched by the investment funds industry to promote investor awareness about personalized reports being issued annually to tell investors how much they paid for their investments over the previous year, and the returns that their investments have earned.

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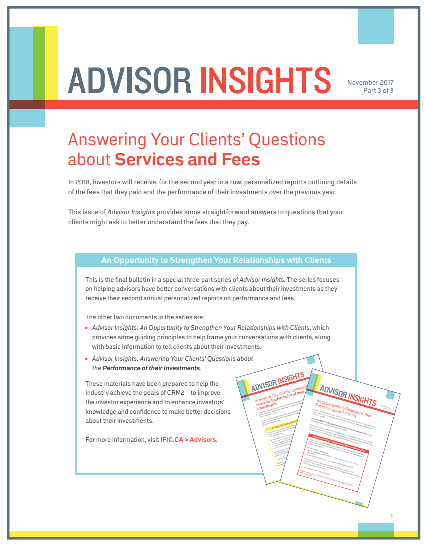
Talking to Your Clients about Their New Reports

The purpose of CRM2 is to increase investor knowledge and engagement. This 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 personalized annual reports with your clients, take a look at these 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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