



The 2019 IAC Affiliate Program

IAC Affiliates are non-investment-dealer firms that operate within or provide services to the Canadian investment industry. They include non-dealer market participants (e.g., custodians, marketplaces and investment managers), service and infrastructure providers, and other investment industry suppliers (e.g., legal, audit, technology and consulting firms).

The IAC Affiliate Program is designed to raise your firm's profile within our industry and ensure your firm has access to an important client base it might not have been able to reach otherwise. It also allows you to show your appreciation to existing clients for their past support of your business. Benefits of Affiliate membership include invitations to member-only events, preferred rates for or complimentary access to IAC conferences, eligible participation in various IAC group benefit plans, participation in select roundtables as presenters or attendees, distribution of your corporate literature to IAC members via IAC communication channels and networking opportunities.

Included as part of the 2019 Affiliate Program:

- ✓ 2 complimentary tickets to IAC symposiums. **Est. value: \$1,000/yr.**
- ✓ 2 complimentary tickets to morning or afternoon events hosted by IAC. **Est. value: \$500/yr.**
- ✓ Additional registrations at IAC events at member rates.
- ✓ Priority consideration for sponsoring IAC events – including discounted prices.
- ✓ Company logo displayed with other Affiliates on IAC Members-only website homepage. **Est. value \$1,000/yr.**
- ✓ Link from logo displayed on IAC website to your website. **Est. value: \$3,500/yr.**
- ✓ At Affiliate request and at the IAC's discretion, "Feature" listing on member-only website – up to 2 events/product launches per year. **Est. value: \$3,000/yr.**
- ✓ Promotion in IAC weekly newsletter maximum 4 times per year consisting of logo, company overview or product sheet. **Est. value: \$3,000/yr.**
- ✓ Access for two people from your organization to the "Members-only" IAC website. **Est. value: \$3,000/yr.**
- ✓ Automatic subscription to the IAC weekly e-newsletter.
- ✓ Automatic subscription to the IAC monthly letter from the President.
- ✓ Eligible for Participation in IAC group health & dental benefits plan (value dependent upon firm size).
- ✓ Eligible for Participation in IAC home and auto insurance plan (value depending upon firm size).
- ✓ Eligible for Participation in IAC Cyber Risk group insurance plan (value depending upon firm size).
- ✓ Priority consideration for partnership with IAC on cost-savings promotions to Member firms.
- ✓ Participation in select working groups – at IAC's discretion.
- ✓ Priority consideration for advertising on public site of iiac.ca – at IAC's discretion.
- ✓ Use of IAC logo as approved on your website and marketing material.

COMPARE: Your price: \$5,000; total estimated value: \$15,000/yr.

Affiliate-IIAC Memorandum of Understanding (MOU)

This sets out the basis of an Affiliate's and the IIAC's mutual understanding of the IIAC's Affiliate Program.

Purpose: The purpose of the Affiliate program is to support IIAC Member firms by engaging non-dealer organizations in or serving the investment industry in Canada or globally in a mutually beneficial relationship. The Affiliate acknowledges that all IIAC advocacy, industry profile, member support and market advancement initiatives will continue to focus on and be driven by the interests of IIAC Member firms.

Confidentiality: Where Affiliates have access to confidential information, including draft IIAC submissions and access to IIAC committee and working group meetings, an Affiliate agrees that they will not disclose information that is or would by a reasonable person be seen likely to be confidential.

Promotion: Affiliates will only promote their products or services at IIAC events or meetings if sponsoring the event/meeting, and then only as agreed upon in advance in writing.

Endorsements: The IIAC does not endorse any Affiliate or Affiliate's products or services and accepts no liability for loss.

Exclusivity: Affiliates acknowledge that IIAC arrangements for sponsorship are not exclusive and may be offered to other IIAC Affiliates.

Membership & Fees: Affiliate fees are \$5,000 annually (net 30 days), renewable and billed annually in advance. Neither the IIAC nor Affiliates are obligated through this MOU to renew the Affiliate membership status. However, if renewed, this MOU continues in force.

Please complete and sign below and return it to Pauline Flores at pflores@iiac.ca.

For Company:

Signature: _____ Date: _____
Name: _____ Title: _____
Phone Number: _____ Email: _____

For IIAC:

Signature: _____ Date: _____
Name: _____ Title: _____
Phone Number: _____ Email: _____