

Description of Six Possible Initiatives for EAI

Below are six possible initiatives that support the three key opportunity areas that could be executed or scoped in the shorter term (October 2020 - February 2021).

1. Messaging, PR, Marketing: Develop consistent investor-focused messaging that clearly communicates our shared value proposition. This will seek to unify our sector-wide messaging for outward-facing engagement channels.

- **Deliverables:** Sector Brand Blueprint, Messaging and PR Kit (investor and public facing), Plan and alignment on use.

Key consideration will be to ensure that individual SIF brand and value propositions are enhanced by the sector messaging, not replaced by it.

2. Education, Programs & Tools: (Brandable) investor-facing educational materials. This may involve creating a NIIPT peer-sharing repository, in which funds would be able to share their current materials. Additionally, it may require soliciting funding (sponsor or government) for further research on investor education needs and material harmonization.

- **Deliverables:** Peer Sharing Network (for collateral), a plan for funding options to develop sector education collateral “kit” (exact contents TBD).

3. Capital Raising & Investor Relations: Create a range of sample portfolios from existing funds to present to investors and test whether they are feasible and attractive to them. This would involve the development of a fund profile and thematic grouping of SIFs. It may also involve exploring whether integrating traditional or public ESG products are interesting to investors.

- **Deliverables:** Process learning and sample portfolios.

4. Capital Raising & Investor Relations: Develop a joint pitch session and materials for 2-3 complimentary funds to present to a panel of investors (by 1 rep).

- **Deliverables:** Pitch Deck and better understanding of both SIF and investor considerations in grouping investment opportunities for efficiency in reaching investors (for both sides) (use offline and online)

5. Capital Raising & Investor Relations - Deeper viability work on developing a tech portal that educates and matches investors to investments as a “front end” to a platform or other channels of investment.

- **Deliverables:** Assumption testing, Costing, and Stakeholder and Partner Engagement Approach for “front end” platform.

6. Marketing/Education/Capital +IR: 1. Enable and support the “already convinced” advisors through outreach conversations to explore specific incentives, tools and resources needed. From these discussions, develop collateral accordingly (may be partly solved by education material and branding material noted above), collaborate with RIA and help already convinced advisors form a peer network.

- **Deliverables:** Advisor materials, peer network for “already convinced” advisors