

The logo for RIIA, featuring the letters 'RIIA' in a bold, blue, sans-serif font. A small, light blue square is positioned above the 'i'.

**Membership  
Guide**

# Testimonials

“The RIA is a leader in promoting the responsible investment industry in Canada as well as providing invaluable education and research on responsible investing issues. RBC Global Asset Management is pleased to be able to actively support the important work of the RIA.”

**Daniel E. Chornous**  
**Chief Investment Officer, RBC Global Asset Management**

“The RIA has provided us with valuable networking and speaking opportunities, and they do a great job of promoting responsible and impact investing in Canada. We are pleased to be a Member of the RIA!”

**Trish Nixon, Managing Director, Commercial Impact Banking**  
**Vancity Community Investment Bank**

“The RIA is a valuable resource for business-building and information about responsible investment. THANK YOU RIA for all the consistent, excellent correspondence.”

**Janice Sowden**  
**Vice President, Connor Clark & Lunn Private Capital**

“RIA Membership is an important business tool for organizations and individuals who practice and support responsible investment in Canada.”

**Michael Jantzi**  
**Chief Executive Officer, Sustainalytics**

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# About the RIA

The Responsible Investment Association (RIA) is Canada's membership association for responsible investment (RI). Members include asset managers, asset owners, service providers, investment advisors, and others who practice and support RI.

## Vision

The RIA aims to drive the growth and development of RI in Canada's retail and institutional markets, with a vision to align capital with sustainable and inclusive development as codified in the Paris Agreement and the UN Sustainable Development Goals.

## Strategic Priorities

The RIA's strategic priorities are summarized as follows:

1. **Educate:** We promote education for the industry and the broader market.
2. **Catalyze:** We play a leadership role in catalyzing market development and promoting RI market integrity in Canada.
3. **Advocate:** We advance a policy/regulatory environment that is conducive to RI.
4. **Build:** We continue to build our brand and reputation as the hub and leading voice for RI in Canada.
5. **Grow:** We aim to grow our financial & human capital resources to strengthen our capacity to deliver on these priorities.

➔ **View our Strategic Priorities document [here](#).**

➔ **View a list of RIA Members [here](#).**

# What We Do

The RIA runs many programs, projects, events and initiatives to deliver on its mandate of growing RI in Canada.

## Educational & Networking Events

- We host the annual RIA Conference to provide education on the latest issues & trends in the field of responsible investing.
- We also host smaller events such as ESG Afterwork and educational events such as ESG Breakfasts.
- As most of our events are in Toronto, Vancouver and Montreal, we also host webinars to reach our members across Canada.

## Professional Development

- We offer several courses and credentials for our members.
- We also partner with members to support their internal events to educate staff, clients and beneficiaries about RI.

## Industry Collaboration

- We lead numerous industry collaborations such as the [Canadian Investor Statement on Diversity & Inclusion](#) and [Canadian Investor Statement on Climate Change](#).
- We act as Secretariat for the Canadian RI Working Group and Policy Stewardship Group to facilitate peer learning and industry collaboration.
- We host the RIA Network listserv – a communications tool for RIA Members to contact other RIA Members for collaborative opportunities.
- We collaborate with peer organizations to drive scale and complementarity across our efforts.

## Research

- We conduct research for the biennial Canadian Responsible Investment Trends Report to track the growth and development of responsible investing in Canada.
- We publish quarterly reports on the performance of RI funds.
- We also publish the annual RIA Investor Opinion Survey to gain market insights from individual investors.

## Digital Communications

- We host the RIA website at [www.riacanada.ca](http://www.riacanada.ca) to promote education about responsible investing.
- We provide a monthly newsletter for members and stakeholders to stay abreast of industry news, jobs, research, product launches and more.
- We leverage social media platforms – LinkedIn and Twitter – to share RIA news and enhance outreach to key stakeholders.

## Media

- As part of our effort to raise awareness of responsible investing and raise the profile of RIA members, the RIA is regularly quoted by industry and mainstream media outlets.
- In addition to media coverage, the RIA CEO has written a regular column for Investment Executive and has placed strategic op-eds in various reputable media outlets.

## Advocacy

- We regularly submit letters to regulators and government to advance the development of responsible investing in Canada.

# **Organizational Memberships**

# Membership Comparison Chart

Summary of Benefits										
Level	Description	Seat on RIA Leadership Council	Top billing on RIA website	Appoint two subsidiaries as Associate Members for no additional cost	Listing and logo placement on RIA website	Added to national directory of RI products & services	Marketing support for your RI events, news, jobs	Networking and peer collaboration	Member discounts	Newsletter and event invitations
<b>Sustaining Membership</b>	Top tier of RIA Membership, for firms seeking a leadership position within the industry.	✓	✓	✓	✓	✓	✓	✓	✓	✓
<b>Associate Membership</b>	Standard level of RIA Membership, for all firms that practice and support responsible investing.	-	-	-	✓	✓	✓	✓	✓	✓
<b>Supporting Membership</b>	For small firms with fewer than 15 staff or fund managers with <\$300M AUM.	-	-	-	✓	✓	✓	✓	✓	✓
<b>Pension Fund Membership</b>	For pension funds that practice and support responsible investing.	-	-	-	✓	-	✓	✓	✓	✓
<b>Nonprofit Membership</b>	For foundations, charities, and registered nonprofits that support RI.	-	-	-	✓	-	✓	✓	✓	✓



# Sustaining Membership

Sustaining Membership is the RIA's top tier of membership, distinguishing firms as leaders in Canada's RI industry. Sustaining Members help to shape the development of RI in Canada, and project an image of RI industry leadership.

## Leadership Benefits – Exclusive to Sustaining Members

- Shape the development of the RI industry with a seat on the RIA Leadership Council, a membership group that meets with the RIA's CEO and Chair/Vice Chair on a quarterly basis to receive updates from management and play an advisory role on large projects & programs.
- Top billing logo placement on the RIA website.
- Appoint two wholly-owned subsidiaries as Associate Members at no additional cost.

## Branding and Marketing Benefits

- Newsletter announcement & branded LinkedIn post upon becoming an RIA Sustaining Member.
- Listing in the national directory of RI products and services.
- License to use the RIA logo to support your branding efforts.
- Marketing support for your RI-related news, events, webinars, and job vacancies via the the RIA Network listserv and monthly RIA newsletters.

## Education and Market Intelligence

- Call upon RIA staff for consultations, speaking engagements, information requests and in-house RI training.
- Partner with the RIA to deliver educational events or webinars for internal staff or external stakeholders.
- Participate in Institutional RI Working Groups to help analysts, portfolio managers and others working in institutional asset management to put RI & ESG integration into practice.
- Discounts on courses and events such as the RIA Conference.
- Earn a responsible investment credential.
- Receive monthly RIA newsletters and other periodic messages to stay abreast of RI industry news & insights.
- RIA Sustaining Members receive 50% off individual memberships for staff or advisors interested in RI certification and an individual profile on the RIA website.

## Networking & Collaboration

- Networking opportunities with asset owners, investment managers, sub-advisors, consultants, advisors & other RI industry participants at RIA events and conferences.
- Participation in the RIA Network listserv – a tool for RIA Members to collaborate and share news & ideas.

# Associate Membership

Associate Membership is the RIA's standard level of membership for all organizations that practice and support responsible investing. This category of membership includes fund companies, asset management firms, research firms, credit unions, financial institutions, brokerages, insurance companies, and consultancies.

## Branding and Marketing Benefits

- Newsletter announcement & branded LinkedIn Post upon becoming an RIA Member.
- Listing in the national directory of RI products and services.
- License to use the RIA logo to support your branding efforts.
- Marketing support for your RI-related news, events, webinars, and job vacancies via the the RIA Network listserv and monthly RIA newsletters.

## Education and Market Intelligence

- Call upon RIA staff for consultations, speaking engagements, information requests and in-house RI training.
- Partner with the RIA to deliver educational events or webinars for internal staff or external stakeholders.
- Participate in Institutional RI Working Groups to help analysts, portfolio managers and others working in institutional asset management to put RI & ESG integration into practice.
- Discounts on courses and events such as the RIA Conference.
- Discounts on RI professional development courses.
- Earn a responsible investment credential.

- Receive monthly RIA newsletters and other periodic messages to stay abreast of RI industry news & insights.

## **Networking & Collaboration**

- Networking opportunities with asset owners, investment managers, sub-advisors, consultants, advisors & other RI industry participants at RIA events and conferences.
- Participation in the RIA Network listserv - a tool for RIA Members to collaborate and share news.

# Supporting Membership

Supporting Membership is for small companies with 15 or fewer staff or less than \$300 million AUM. Organizations with more than 15 staff, and fund managers with more than \$300 million AUM are candidates for Associate Membership.

## Branding and Marketing Benefits

- Newsletter announcement & branded LinkedIn post upon becoming an RIA Member.
- Listing in the national directory of RI products and services.
- License to use the RIA logo to support your branding efforts.
- Marketing support for your RI-related news, events, webinars, and job vacancies via the the RIA Network listserv and monthly RIA newsletters.

## Education and Market Intelligence

- Call upon RIA staff for consultations, speaking engagements, information requests and in-house RI training.
- Partner with the RIA to deliver educational events or webinars for internal staff or external stakeholders.
- Participate in Institutional RI Working Groups to help analysts, portfolio managers and others working in institutional asset management to put RI & ESG integration into practice.
- Discounts on RI professional development courses.
- Discounts on courses and events such as the RIA Conference.

- Earn a responsible investment credential.
- Receive monthly RIA newsletters and other periodic messages to stay abreast of RI industry news & insights.

## **Networking & Collaboration**

- Participate in institutional investor working groups to collaborate and learn from peers.
- Networking opportunities with asset owners, investment managers, sub-advisors, consultants, advisors & other RI industry participants at RIA events and conferences.
- Participation in the RIA Network listserv – a tool for RIA Members to collaborate and share news & ideas.

# Pension Fund Membership

The RIA's Pension Fund Membership is for Canadian pension plans and public pension plan managers who practice and support responsible investment in Canada.

## Networking & Collaboration

- Participate in institutional investor working groups to collaborate and learn from peers.
- Networking opportunities with asset owners, investment managers, consultants, advisors & other RI industry participants at RIA events and conferences.
- Participation in the RIA Network listserv – a tool for RIA Members to collaborate and share news & ideas.

## Branding and Marketing Benefits

- Newsletter announcement & branded LinkedIn post upon becoming an RIA Member.
- License to use the RIA logo to support your branding efforts.
- Marketing support for your RI-related news, events, webinars, and job vacancies via the the RIA Network listserv and monthly RIA newsletters.

## Education and Market Intelligence

- Call upon RIA staff for consultations, speaking engagements, information requests and in-house RI presentations & training.
- Partner with the RIA to deliver educational events or webinars for internal staff or external stakeholders.
- Participate in Institutional RI Working Groups to help analysts, portfolio managers and others working in institutional asset management to put RI & ESG integration into practice.
- Discounts on courses and events such as the RIA Conference.
- Earn a responsible investment credential.
- Receive monthly RIA newsletters and other periodic messages to stay abreast of RI industry news & insights.



# Nonprofit Membership

Nonprofit Membership is for foundations, charities, faith-based organizations and registered nonprofit organizations that practice and support responsible investing.

## Branding and Marketing Benefits

- Newsletter announcement & branded LinkedIn post upon becoming an RIA Member.
- License to use the RIA logo to support your communications efforts.
- Discounts on events, courses, and sponsorship of the annual RIA Conference - Canada's premier conference on RI.
- Marketing support for your RI-related news, events, webinars, and job vacancies via the the RIA Network listserv and monthly RIA newsletters.

## Education and Market Intelligence

- Call upon RIA staff for consultations, speaking engagements, information requests and in-house RI training.
- Partner with the RIA to deliver educational events or webinars for internal staff or external stakeholders.
- Participate in Institutional RI Working Groups to help analysts, portfolio managers and others working in institutional asset management to put RI & ESG integration into practice.
- Discounts on RI professional development courses.

- Earn a responsible investment credential.
- Receive monthly RIA newsletters and other periodic messages to stay abreast of RI industry news & insights.

## **Networking & Collaboration**

- Networking opportunities with asset owners, investment managers, sub-advisors, consultants, advisors & other RI industry participants at RIA events and conferences.
- Participation in the RIA Network listserv - a tool for RIA Members to collaborate and share news.

# **Individual Memberships**

# Advisor Membership

## \$350 annually

RIA Advisor Membership is for registered financial advisors who practice and support responsible investing.

### Branding and Marketing Benefits

- Placement in the national directory of Responsible Investment Advisors.
- Profile page on the RIA website to help attract potential clients.
- License to use the RIA logo to support your branding & marketing efforts.



### Education and Market Intelligence

- Call upon RIA staff for consultations and information requests.
- Discounts on events & RI professional development courses.
- Earn a responsible investment credential.
- Receive monthly RIA newsletters and other periodic messages to stay abreast of RI industry news & insights.

## Networking & Collaboration

- Networking opportunities with asset owners, consultants, fund companies, advisors, investment managers & other RI industry participants at RIA events and conferences.
- Participation in the RIA Advisor Members' listserv – a tool for RIA Advisor Members to connect, share ideas and pose questions to like-minded advisors across the country.

“The RIA has provided me with a great network of like-minded professionals along with an abundance of useful information about the responsible investment industry. I am impressed with the organization and pleased to be an RIA Member. Best of all, being certified through the RIA distinguishes me from everyone else in the investment business.”

**Michael Silicz (RIAC)**  
**Investment Advisor, National Bank Financial Wealth Mgmt.**

“My clients want their portfolios to be aligned with their values, and many have moved to me from other advisors because I can help them do that.”

**Sucheta Rajagopal**  
**Certified Financial Planner and Portfolio Manager**  
**Mackie Research Capital**

# Professional Membership

## \$350 annually

RIA Professional Membership is for sole proprietors, lawyers, analysts and other individuals who practice and support responsible investment.

### Branding and Marketing Benefits

- Profile page on the RIA website to help attract potential clients.
- License to use the RIA logo to support your branding & marketing efforts.
- Listing in the national directory of RI products and services.

### Education and Market Intelligence

- Call upon RIA staff for consultations and information requests.
- Discounts on events & RI professional development courses.
- Earn a responsible investment credential.
- Receive monthly RIA newsletters and other periodic messages to stay abreast of RI industry news & insights.

### Networking & Collaboration

- Networking opportunities with asset owners, consultants, fund companies, advisors, investment managers & other RI industry participants at RIA events and conferences.
- Participation in the RIA Network listserv - a tool for RIA Members to connect and collaborate.

# Contact Us

For more information about membership, please send an email to [membership@riacanada.ca](mailto:membership@riacanada.ca)

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