

# **MEMBERSHIP GUIDE**



# **RIAA** is the peak industry body representing responsible and ethical investors across Australia & New Zealand.

The Responsible Investment Association Australasia (RIAA) has over 165 members who manage more than a trillion in assets under management globally, including super funds, fund managers, consultants, researchers, brokers, impact investors, property managers, community banks, community trusts, religious groups, financial advisers and individuals.

The responsible investment sector constitutes a growing force in the finance and capital markets of Australasia with over 50% of the major super funds and eight of the top ten fund managers have committed to a more responsible approach to undertaking investments.

## **RIAA works to see more capital being invested more responsibly.**

RIAA does this by actively promoting the concept of responsible investment, across the finance industry and to the investing public, with the objective of increasing the uptake and deepening the impact of responsible investment.

### **RIAA is a hub of timely and relevant ESG information for our members, through research and events, webinars, conference calls and field trips.**

- In FY2015, RIAA is delivering 12 events for our members including our annual conferences in Australia and New Zealand
- RIAA produces briefing papers on key issues and policy, as well as producing submissions on important policy developments
- Our working groups bring members together around important areas of work, including impact investment and corporate engagement
- Our annual Responsible Benchmark Report is a critical industry resource measuring the size, growth and performance of the industry
- RIAA's annual Investor Field Trip offers a unique opportunity for our members to spend time on the ground investigating ESG issues with companies and their stakeholders.

## **RIAA is a strong voice for the industry through media, communications and promotion**

- RIAA runs the world's first Certification program for funds and advisers, offering a unique marketing edge for our members whose products gain recognition under this program
- RIAA has driven well over 100 media mentions in FY2015 across industry press, mainstream media and consumer press, online, on radio, television and print
- RIAA's 6 weekly newsletter goes out to 2,000 people across the region and includes news of our members
- Our website promotes all our members and receives thousands of visitors each month

## **RIAA works to build the capacity of the industry in responsible investing**

- We offer thought leadership that continues to drive the development of responsible investment, and bring together key groups within the industry and our members around the issues that matter
- We offer discounted access to the world's leading Responsible Investment education offering, the PRI Academy (developed by RIAA and now managed by the PRI)
- RIAA offers the most extensive and developed network of Responsible Investment organisations in our region
- Our activities offer the best way for people and organisations in the industry to connect and network with their peers and colleagues.

Join over **160** members managing more than a

***trillion*** in AUM globally.

# BENEFITS OF MEMBERSHIP

Becoming a member of RIAA will bring the following benefits to you and your organisation.



## Connection:

Connect to the largest network of responsible investors in our region, meet and network with industry colleagues, and keep fully informed on developments in the industry.



## Promotion:

- Promote your organisation on RIAA's website, and the inclusion of your company news and thought leadership pieces in our regular newsletter
- RIAA prioritises using our member's expertise as speakers at our events
- Ability to apply for your product's Certification, giving it a distinct edge in the market as being a Certified Responsible Investment Product



## Information:

- Access for your staff (unlimited number) to RIAA member only events, webinars, conference calls, field trips including recordings of events and key resources.
- Special RIAA member discounts to our annual conference in Australia
- Call on RIAA staff as a key resource, for speaking engagements, general industry intelligence and connections across the industry



## Education:

- Discounted access to the leading global RI education offering, the PRI Academy - 25% off .



## Participation:

- In member working groups, in policy development, and in informing the program of events and direction of the organisation
- The ability to put up a candidate for the RIAA board and vote on board nominations



## Leadership:

Your membership of this industry body is simply the best way to demonstrate your organisation's leadership and commitment to responsible investment at a time of growing interest and demand for RI products.

# 2017 MEMBERSHIP FEES

All fees are in Australian dollars, are expressed as annual fees, and are GST exclusive.

Where fees are tiered based on AUM, this relates to the total value of those assets under management in the Australasian region (Australian and New Zealand) or value of assets managed on behalf of Australian and New Zealand clients.

Membership fees are exclusive of fees associated with the Responsible Investment Certification Program.

<b>Asset Manager</b>		
	<\$50m	\$2,410
	\$50 - \$500m	\$3,368
	\$500 - \$5b	\$6,630
	\$5b - \$20b	\$8,767
	>\$20b	\$11,568
<b>Asset Owner</b>		
	<\$1b	\$1,808
	\$1b - 10b	\$2,307
	\$10 - 30b	\$2,685
	>\$30b	\$3,371
<b>Asset Consultant</b>		\$3,013
<b>Banking Institution</b>		\$12,818
<b>Community Bank</b>		\$2,524
<b>Community Trust, Family Office or Foundation</b>		\$1,801
<b>Professional Services</b>		\$7,223
<b>Dealer Group*</b>		
	0-10 advisers	\$1,391
	11-20 advisers	\$2,704
	21-50 advisers	\$5,150
	51-250 advisers	\$8,240
	251+ advisers	\$12,746
<b>Financial Adviser</b>		\$455
<b>Research Firm</b>		
	0 - 10 FTE	\$2,524
	11+ FTE	\$2,884
<b>RI Consultant</b>		
	0 - 5 FTE	\$1,082
	6+ FTE	\$2,524
<b>Supporting Organisation**</b>		\$788
<b>Supporting Individual</b>		\$227

\*Dealer Groups can publicly state their association with RIAA at the corporate website level. However, licensed Advisers cannot individually use the RIAA logo on their individual marketing materials.

\*\*\*Includes Charities, Not-For-Profits, Religious Organisations and Academics

# MEMBERSHIP APPLICATION

Please complete all details and return to [info@responsibleinvestment.org](mailto:info@responsibleinvestment.org)

## Membership Details

Member Name\*

Address

City

State

Post Code

Website

Membership Category

Assets Under Management\*\*

Organisational Bio^

## Primary Contact Details

First Name

Last Name

Position

Email Address

Phone Number

Mobile

Address

City

State

Post Code

Country

By submitting this application you agree to having read and understood our Privacy Policy, a copy of which can be found on the RIAA website.

**Please return this application to  
Josh Edmunds, Operations Coordinator at [info@responsibleinvestment.org](mailto:info@responsibleinvestment.org).**

\* The Member Name is the business name for your organisations, or your own first and last if you are applying as a Financial Adviser or Supporting Individual.

\*\*Assets Under Management are determined by your organisations total assets under management with the Australasian region.

^ Organisational Bio should be a brief summary of your commitment to, and interest in responsible investment. This statement will form part of your public profile on the RIAA website.