



Responsible Investment
Association Australasia

2020 Membership Guide

Working to align capital to achieve a healthy and
sustainable society, environment and economy

Who we are

The Responsible Investment Association Australasia (RIAA) champions responsible investing and a sustainable financial system in Australia and New Zealand.

Our Members

With over 300 members managing more than \$9 trillion in assets globally, RIAA is the largest and most active network of people and organisations engaged in responsible, ethical and impact investing across Australia and New Zealand.

Our membership includes:

- Super funds
- Fund managers
- Banks
- Credit unions and mutuals
- Consultants
- Researchers
- Brokers
- Impact investors
- Property managers
- Trusts
- Foundations
- Faith-based groups
- Financial advisers
- Individuals.

What we do

Our mission is to promote, advocate for, and support approaches to responsible investment that align capital with achieving a healthy and sustainable society, environment and economy.



RIAA achieves its mission through:

1. **Providing a strong voice for responsible investors** in the region, including influencing policy and regulation to support long-term responsible investment and sustainable capital markets;
2. **Delivering tools for investors and consumers** to better understand and navigate towards responsible investment products and advice, including running the world's first and longest running fund Certification Program, and the online consumer tool Responsible Returns;
3. **Supporting continuous improvement in responsible investment** practice among members and the broader industry through education, benchmarking and promotion of best practice and innovation;
4. **Acting as a hub for our members**, the broader industry and stakeholders to build capacity, knowledge and collective impact; and
5. **Being a trusted source of information** about responsible investment.

In the last financial year...

252
media mentions

6
policy
submissions

26
member events

2
annual
conferences

159
certified
products

6
research reports

Benefits of membership

By becoming a RIAA member, you gain access to the full offering of RIAA's activities and research



Connection

As a RIAA member, you'll gain access to the largest network of responsible investors in our region, meet and network with industry colleagues, and keep fully informed on developments in the sector.



Participation

Participation in our working groups that bring members together around important areas of work, including impact investment, corporate engagement, human rights and ESG research.



Education

RIAA members receive discounted access to the leading global RI education offering, the PRI Academy, while also receiving complimentary continuing professional development hours through the Financial Planning Association of Australia for member events.



Insights and information

Enjoy RIAA member-only events, webinars, conference calls and annual field trips including recordings of events and key resources. Special RIAA member discounts also apply to our annual conferences in Australia and New Zealand. Gain first access to our annual Responsible Benchmark Report, a critical industry resource measuring the size, growth and performance of the industry. Members can also call on RIAA staff as a key resource for speaking engagements, industry intelligence and connections across the industry.



Certification

Eligibility to apply for certification through our Responsible Investment Certification Program. Our Certification Symbol provides consumers and investors with an easily-identifiable mark of quality.



Leadership

RIAA membership is the best way to demonstrate your organisation's leadership and commitment to responsible investment at a time of unprecedented interest and demand for RI products.

Benefits in detail

Did you know that RIAA has a **92%** member satisfaction rate?

Networking Benefits

- Connect with the largest network of responsible investors in our region; meet and network with industry colleagues.

Branding and Marketing Benefits

- Social Media and Newsletter announcement upon joining RIAA
- Listing on the RIAA membership directory
- Listing on RIAA's Find a Financial Adviser online directory for financial advisers, including complimentary financial adviser memberships for Financial Advisory Groups.
- Ability to use RIAA logo to support your marketing efforts to demonstrate your organisation's leadership and commitment to responsible investment.

Professional Development Benefits

- Access to member only events such as webinars, conference calls, seminars and field trips to keep members full informed on developments in the sector
- Member discounts to our RIAA RI Australia and RI New Zealand conferences, the annual gathering for responsible investors in our region
- Discounted access to the PRI Academy, the leading global RI education offering
- Access to member resources and information including recordings of events and regular industry news updates
- Complimentary continuing professional development hours through the Financial Planning Association of Australia for member events

Research Benefits

- Gain first access to our Responsible Investment Research Series, which are the go-to resource for reliable data on the size, growth and performance of the responsible, ethical and impact investment markets

Industry Collaboration Benefits

- Join our member-only working groups focused on human rights, corporate engagement, ESG research and impact measurement.

Certification and Industry Recognition Benefits

- Apply to have investment products or services certified and listed on our consumer-facing Responsible Returns online tool.
- Apply to be recognised as a certified Financial Adviser under the Responsible Investment Certification Program.
- Participate in the Annual ESG Research Awards which seek to recognise leading ESG research in Australia.

Membership Pricing

FY2019 - FY2020

Category	Tier	Price
Asset Consultants		\$3,812
Asset Managers		
	<\$50m	\$2,863
	\$50m - \$500m	\$4,001
	\$500m - \$5b	\$7,876
	\$5b - \$20b	\$10,889
	\$20b - \$50b	\$14,367
	\$50b+	\$15,930
Asset Owners		
	<\$1b	\$2,245
	\$1b - \$10b	\$2,865
	\$10b - \$30b	\$3,335
	\$30b+	\$4,187
Banking Institutions		\$19,646
Credit Unions and Mutuals		\$3,193
Financial Advisers		\$526
Financial Advisory Groups*		
	1 - 5 advisers	\$1,350
	6 - 10 advisers	\$2,484
	11 - 20 advisers	\$3,359
	21 - 50 advisers	\$6,397
	51 - 250 advisers	\$10,234
	251+ advisers	\$15,831

Category	Tier	Price
Governments		\$5,500
Insurance Firms		
	\$500m - \$5b	\$7,876
	\$5b - \$20b	\$10,889
	\$20b - \$50b	\$14,367
	\$50b+	\$15,930
Research Firms		
	1 - 10 FTE	\$3,135
	11+ FTE	\$3,649
RI and Impact Consultants		
	1 - 5 FTE	\$1,368
	6+ FTE	\$3,193
Professional Services		\$8,970
Supporting Organisations**		\$997
Supporting Individuals		\$262
Trusts and Foundations		\$2,139
Wealth and Investment Platforms		
	<\$5b	\$2,863
	\$5b - \$10b	\$4,295
	\$10b - \$20b	\$6,001
	\$20b - \$50b	\$11,814
	\$50b+	\$15,930

All fees are either Australian or New Zealand dollars depending on where you are domiciled, expressed as annual fees and exclusive of GST.

Pricing valid from 1 April 2020.

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.

*Financial Advisory Groups replaces the Dealer Groups category. Financial Advisory Groups for the purpose of membership include Australian Financial Services License holders and Corporate Authorised Representative businesses (or similar structure operating under separate branding) and Financial Advice Providers operating in New Zealand. Optional complimentary financial adviser listings are capped at the category tier or a maximum of 20 per membership.

**Includes charities, not-for-profits, religious organisations and academic institutions.



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For more information on membership
please contact RIAA

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