

SIAA EDUCATION PARTNERSHIP proposal



The Stockbrokers and Investment Advisers Association (SIAA) is the professional body for the stockbroking and investment advice industry. Our members are Market Participants and Advisory firms which provide securities and investment advice, execution services and equity capital-raising for Australian investors, both retail and wholesale, and for businesses. Practitioner Members are suitably qualified professionals who are employed in the securities and derivatives industry.

Developed by the industry, for the industry, our bespoke and educational content is integral to ensuring practitioners can apply their learning in the workplace and remain up-to-date. We cover content relevant to the mandated professional standards, as well as the real-world knowledge and experience required to operate in capital markets.

As an education partner you would have the opportunity to deliver up to four workshops over a 12-month period, participate as an exhibitor at our SIAA 2023 conference, regularly contribute content to our *SIAA Monthly* newsletter that goes to members and the *SIAA Newsroom* newsletter that goes to the broader network. The workshops include the opportunity for interaction, Q&A and a brief quiz to consolidate learning outcomes for the delegates.

Our SIAA-accredited CPD workshops attract between 50 and 150 participants and are offered free to our members.

Sponsorship offer \$22,000 including gst for a 12-month period

- ✓ **Workshops:** you will have the opportunity to interact with our members through delivery of up to four online workshops scheduled over a 12-month period.
- ✓ **SIAA 2023 conference:** as an exhibitor you will be given a booth, conference registrations, pre-conference promotion and branding across all mediums.
- ✓ **EDM communications:** your company brand will be included on all workshop and conference EDMs (between 15 and 25 EDMs over a 12-month period) that reaches a circulation of up to 8,000 including the employees of our 30 principal firms.
- ✓ **SIAA website:** you will be acknowledged as an education partner and your company brand will be placed on our workshop and conference landing pages that will guarantee you a highly viewed positioning with a link to your website.
- ✓ **SIAA Monthly:** opportunity to include four educational articles targeted at investment advisers and stockbrokers. Distributed monthly, this pdf newsletter is sent directly to members, as well as to Heads of Desk, Heads of Advice, Heads of Compliance and CEOs for distribution via the respective organisations's intranet. A reduced version is also sent to non-members. This publication has a reach of up to 8,000 brokers and investment advisers.
- ✓ **SIAA Newsroom:** opportunity to include four educational articles and four banners in this monthly newsletter sent to those working in investment advice firms and affiliated stakeholders with an open rate of 66%.



Stockbrokers and Investment
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Serving the interests of investors



SIAA 2023 conference

Following the success of our 2022 conference held at the Sofitel and virtually, combined with the desire to network, we will again hold a conference featuring networking drinks at the end of day one.

- ✓ **Reach the decision-makers:** at the 2022 conference the majority of delegates at the face-to-face event were department heads and managers, whereas the majority of the virtual delegates were advisers. Overall, key decision makers accounted for just over 40% of attendees and advisers accounted for 28% of attendees.

	F2F	VIRTUAL
Adviser	14%	43%
Business Development Manager	6%	2%
CEO/Board/MD/CFO	14%	9%
Compliance/Risk	11%	8%
Manager/Heads of firm	42%	20%
Operations/Tech	9%	10%
Research/Analysis	4%	8%

- ✓ **Reach new clients:** marketing of our conference to a wider audience saw an increase of industry delegates attending the SIAA conference for the first time.

My first	34.04%
< 5	25.53%
> 5	40.43%

- ✓ **Up-to-date information:** feedback provided by delegates show that the top reason for attending the conference was to gain information. Delegates will be interested to learn about your offer.


Information	4.57	Networking	3.18
Business	3.39	CPD hours	3.15

For more information please contact

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Workshop series

As our members are time-poor, delivery and development of an online workshop series over a period of time will build momentum and attract numbers. Offered free with SIAA-accredited CPD, these workshops are seen as a value proposition for our members. We'd be pleased to discuss the workshop content to maximise outcomes for both you and our members. Below are some themes which would be of interest.

- ✓ ESG investing
- ✓ Ethics
- ✓ ETFs
- ✓ Fixed income
- ✓ General and personal advice
- ✓ Impact investing
- ✓ Incidental tax advice for stockbrokers/investment advisers
- ✓ Portfolio construction
- ✓ Portfolio management
- ✓ Trusts and wills: structuring investment advice

Why sponsor

Our education partnership will provide you with the golden opportunity to increase your ability to broaden your brand exposure, capture new enquiries and lead generation.

- ✓ **Showcase your expertise:** the opportunity to participate in a workshop series and contribute regular educational articles will promote your organisation as a specialist in your field of expertise.
- ✓ **Direct promotion:** provides the opportunity to promote your product or service directly to conference delegates as well as to our broader membership.
- ✓ **Brand promotion:** regular brand promotion via the SIAA Monthly, SIAA Newsroom and website over a 12-month period will ensure that your brand remains at the forefront of members' minds.
- ✓ **Niche market exposure:** cost-effective exposure over a lengthy period of time.
- ✓ **Brand alignment:** align your firm and brand with the key association representing the stockbroking and investment advice industry.



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