

## Entry guidelines

The AIC developed the Shareholder Communication Awards to demonstrate the investment company industry's commitment to providing excellent communications. With the disruption and uncertainty of the last 12 months, clear and effective communication has never been more important.

All award categories will consider the level of detail provided to shareholders, as well as the timeliness, relevance and presentation. The categories will also consider any enhancements made to help shareholders during the pandemic.

The AIC would like to encourage all AIC members and their managers to submit entries by email to one or more categories.



## Entry guidance

Below is some guidance on each category to help you meet the judging criteria.

### Best Marketing Campaign

Material submitted should relate to a targeted marketing campaign on a specific issue/theme, either for an individual investment company or for a management group range.

Materials for submission can include any elements of the marketing mix, both above and below the line, including factsheets or online newsletters through to online advertising and direct marketing, or anything else considered relevant.

Entries should include a summary of the campaign strategy, including evaluation and success measures.

### Best PR Campaign

Material submitted should relate to a targeted PR campaign on a specific issue/theme, either for a particular investment company or for a management group range.

Materials for submission can include press releases, blogs, placed articles, event material or anything else considered relevant.

Entries should include a summary of the campaign strategy, including evaluation and success measures.

### Best Report and Accounts

There are four separate categories for this award depending on the investment company sector, namely, generalist, specialist, alternative and VCT. Entries must be the most recent report and accounts.

Submissions should include a supporting statement or summary to highlight specific features, for example, an ESG disclosure or if the report and accounts has been reformatted or rebranded.

## Entry guidance

Below is some guidance on each category to help you meet the judging criteria.

### Best Social Media

Entries for this award should highlight the use of social media channels such as Twitter, Instagram, LinkedIn, YouTube, Facebook or any other social media platform you use for communicating with shareholders.

Entries should include a summary of the use of social media for an investment company or management group range, including evaluation and success measures.

### Best Website

Supporting statements should include information on the strategy and evaluation of the website, as well as information on the rationale for navigation and design.

Judges are also looking at the visual presentation as well as the accessibility and quality of information available. If there are specific areas of the website you would like to draw attention to, please outline these clearly with an explanation. Statistics for visitor engagement, material downloaded or any other figures considered relevant can also be included.

Please include clear links to the website/webpages.

### Best Factsheet

Submissions should include a supporting statement or summary to highlight specific features, for example, if the factsheet has been reformatted or rebranded. Entries must be the most recent factsheet.

Any supporting material, for example, download figures from the website, can also be included.

### Best ESG Communication

Entries to this category should reflect how effectively an investment company or management group has communicated its approach to ESG. This communication could take any form, including written reports, websites, videos or events, or any combination of these.

Submissions should include a supporting statement to highlight specific features, such as evaluation and success measures, and anything else considered relevant.

## How to enter

- The AIC office is closed. We are therefore only able to accept entries by email. Entries by post will not be judged.
- You can enter more than one category, however each entry must be emailed separately.
- When emailing an entry, please attach separate files for the entry form, supporting statement and supporting material.
- Send your completed entries to:

**Elmley.delaCour@theaic.co.uk**

## Submission deadline

Entries must be received by no later than **5pm on Friday 30 April 2021.**

## Announcing the winners

The winners will be announced by press release in June.

## Award categories

- Best Marketing Campaign
- Best PR Campaign
- Best Report and Accounts
- Best Social Media
- Best Website
- Best Factsheet
- Best ESG Communication

## Don't forget

Entries must be received by the AIC no later than **5pm on Friday 30 April 2021**

## The judging panel

An independent panel will judge the award entries.



### Tim Cockerill

**Investment Director and Head of ESG,  
Rowan Dartington**

Tim has been in the investment industry for over 30 years and is Investment Director and Head of ESG at Rowan Dartington. His responsibility is now focused on ESG analysis for both fund research and portfolio management, an area he has been passionate about since joining the industry and an area he has managed portfolios in for more than 20 years. Tim also works closely with SJP's Responsible Investment Team and is a member of the SJP Asian Investment Committee. Prior to Rowan Dartington he worked for a number of leading private client businesses where he has held various senior positions. Tim is a Chartered FCSI and holds a BA Hons in Economics.



### Simon Elliott

**Head of Research, Winterflood Investment Trusts**

Simon has covered the investment trust sector since 2002, when he joined Winterflood Securities, and has headed the research team since 2008. Simon started his career with PwC, qualifying as a chartered accountant in 1998, and has a MBA with Cranfield School of Management.



### Moira O'Neill

**Head of Personal Finance, Interactive Investor**

Moira O'Neill is Head of Personal Finance at Interactive Investor, the leading investment platform, where she heads up communications, content and investment recommendations. She is also an investment columnist for the Financial Times and a regular contributor to TV and radio programmes. Moira was a personal finance journalist for more than 20 years, holding senior roles at Moneywise, Investors Chronicle and Money Observer and writing two books. She won the Harold Wincott Personal Finance Journalist of the Year award for her work in 2012. She read Classics at Cambridge University.



### David Stevenson

**Freelance journalist**

David is a financial journalist and commentator for a number of leading publications including the Financial Times, Investment Week, MoneyWeek, Investors Chronicle and Citywire. He is executive director of the alternative finance news and events service, [www.altfi.com](http://www.altfi.com), and author of a number of books on investment. David is chairman of Secured Income Fund and a non-executive director of Aurora Investment Trust and Gresham House Energy Storage.