

## Entry guidelines

The AIC developed the Shareholder Communication Awards to demonstrate the investment company industry's commitment to providing excellent communications. The awards recognise companies that stand out by using effective communication methods to keep shareholders informed.

The judges of the award categories will consider the level of detail provided to shareholders, as well as the timeliness, relevance and presentation.

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 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.

### 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 include the most recent factsheet.

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

### 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.

## **Entry guidance** (continued)

### **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.

### **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.

## How to enter

- We are 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:  
[vanessa.booth@theaic.co.uk](mailto:vanessa.booth@theaic.co.uk)

## Submission deadline

Entries must be received by the AIC no later than **5pm on Friday 28 April 2023**.

## Announcing the winners

The winners will be announced at the AIC awards dinner on Tuesday 19 September 2023 and by press release.

## Award categories

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

## Don't forget

Entries must be received by the AIC no later than **5pm on Friday 28 April 2023**

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## The judging panel 2023

An independent panel will judge the award entries.



**Geneva Banzky von Ambroz**  
Partner, Evelyn Partners

Genevra joined Evelyn Partners, then Smith & Williamson Investment Management, in 2008. She is a fund manager and analyst, who has covered investment companies, both conventional and alternative, for the firm throughout her career. Genevra manages Evelyn's Sustainable Fund-of-Funds and MPS and co-manages a number of other multi-asset solutions for clients, including a fund of investment trusts. She is a member of the firm's stewardship and responsible investment group and responsible investment strategy group. Genevra read Politics at Durham University, is a CAIA charterholder, a chartered fellow of the CISI and holds CFA certificates in ESG Investing, and Climate and Investing.



**Anthony Leatham**  
Head of Investment Companies Research, Peel Hunt

Anthony is Head of Investment Companies Research at Peel Hunt. He joined Peel Hunt in 2015 from Investec Wealth & Investment to help build the growing investment companies arm. Anthony was at Investec for 10 years, working for the last eight years in the fund research team, where he covered global, sector specialist, US, European and emerging market equity open and closed ended funds. Prior to this, Anthony was a regulatory consultant at Deloitte, a position he held for five years, providing advisory services to a range of asset managers and investment banks.



**Moira O'Neill**  
Investment Journalist

Moira is an independent freelance investment and money writer, editor and presenter. She is a columnist for the Financial Times and a regular contributor to TV and radio programmes. She was previously head of content at interactive investor, editor at Moneywise, personal finance editor at Investors Chronicle and deputy editor at Money Observer. She has won a Wincott Journalism Award and written two personal finance books, Finance at 40 and Saving and Investing for Your Children. She read Classics at Cambridge University.



**David Stevenson**  
Freelance Journalist

David is a financial journalist known as the Adventurous Investor ([davidstevenson.substack.com](http://davidstevenson.substack.com)) and he is a commentator for a number of leading publications including the Financial Times, 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.