

## 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.

All award categories will consider the level of detail provided, as well as how often information is updated, its relevance and the 'look and feel' of the information provided to shareholders.

The AIC would like to encourage all AIC members and their managers to submit entries 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 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 three separate categories for this award depending on the investment company sector, namely, generalist, specialist 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, 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, LinkedIn, YouTube (or alternative), 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.

## How to enter

- You can enter more than one category, however each entry must be submitted separately.
- Please include a supporting statement with each entry.
- If entering by post, you will need to submit 6 copies each of the **entry form**, your supporting statement and your supporting material.
- If entering by email, you will need to separately attach your **entry form**, your supporting statement and the files of your supporting material.
- Send your completed entries:

### By post

Elmley de la Cour, Communications Manager, AIC,  
24 Chiswell Street, London EC1Y 4YY

### By email

Elmley.delaCour@theaic.co.uk

## Submission deadline

Entries must be received by the AIC no later than **5pm on Friday 5 April 2019**.

## Award categories

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

## Presentation of awards

The winners will be announced at the AIC Annual Dinner at the Savoy Hotel in London on Thursday 6 June 2019.

To enquire about taking a table at the dinner, please contact Hazel Weston, Events Executive, on [events@theaic.co.uk](mailto:events@theaic.co.uk), or visit the event pages in the member area of the AIC website <https://www.theaic.co.uk/members/events>.

## The judging panel 2019

An independent panel will judge the award entries.



### Tim Cockerill

**Investment Director, Rowan Dartington**

Tim has been in the investment industry for over 25 years, for a number of leading private client investment companies. He has specialised in fund research for the whole of his career, along with portfolio management and asset allocation.



### 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 became Head of Personal Finance for interactive investor in March 2018, after more than 20 years in personal finance journalism, including senior roles at Money Observer, Investors Chronicle and Moneywise. She is editor-in-chief of interactive investor editorial, plus Moneywise and Money Observer, the independent magazines owned by interactive investor. She is also head of communications and personal finance strategy for the business. Moira is also an investment columnist for the Financial Times and is a holder of the Wincott Personal Finance Journalism Award.



### Emma Sexton

**Founder & CEO, MYWW™**

Emma has over 20 years' design experience and is a board level adviser to brands and businesses. In 2016 Emma was shortlisted for The Drum's Creative Woman of the Year. She is also a Creative Pool Top 100 Influencer 2017 & 2018. In 2017 Emma was appointed 'Creative in Residence' on the King's 20 Accelerator Program at King's College, London and also most recently at Imperial College London for their Enterprise Lab advising start-ups and entrepreneurs on design and branding.



### David Stevenson

**Freelance journalist**

David is a financial journalist and commentator for a number of leading publications including The Financial Times, Investment Week, Money Week, 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 also a non-executive director of SQN Secured Income Fund.