

SASKWORKS CO-OP MARKETING

SaskWorks Co-op Marketing program assists advisors with the design and implementation of SaskWorks-focused marketing activities. Advisors will be reimbursed for 50% of pre-approved expenses associated with such initiatives. Co-op marketing projects may include but are not limited to:



Television: 15 or 30 second commercials on local networks to put a face and a voice to your name. A media consultant will assist with choosing the appropriate channels, times, and frequency for your budget and goals.



Print: Traditional print advertisement in publication(s) of your choosing. Ad size and distribution depend on your budget and target audience.



Radio: Complement other advertising mediums with a personalized 15 or 30 second spot as part of a SaskWorks pre-designed ad to reach a local and rural audience.



Outdoor: Capture the attention of viewers on large outdoor billboards, either static or digital in various locations across the province.



Washrooms: They have nowhere else to look when using the toilet or drying their hands so why not make it an ad with your name and information? Choose from local restaurants, fitness facilities and education centres.



Digital: Digital ads on desktop or mobile devices that direct traffic to your website or landing page of your choice. Social media ads are also an inexpensive option to reaching a large but targeted audience on a digital platform.



Mail Drops: SaskWorks coordinates targeted mail drops of customized marketing brochures to key areas of Saskatchewan. Locations are allocated on a first-come, first-served basis.

*Deadline to express interest, provide imprint information and indicate target locations: **October 13, 2020***

*Deadline to provide proof of compliance approval on brochure imprint: **October 23, 2020***

*Delivery of brochures: **November 26, 2020***



Personalized Brochures: SaskWorks will imprint the current marketing brochures with your contact information free of charge. The minimum order per imprint is 100 pieces and can be ordered at any time throughout the year.



Seminar/Event: SaskWorks will co-sponsor informational seminars and events that you would like to host, including developing and distributing personalized invitations for the event.

Due to an anticipated January sell-out, October/November campaign dates are recommended.

If you would like to participate in SaskWorks 2020/2021 RRSP season program, please express your interest to dianahilderman@pfm.ca or complete the online Order Form found at saskworks.ca by **Tuesday, October 13, 2020**.

We will do our best to accommodate all advisor-led initiatives but approval of requests received after November 30, 2020 cannot be guaranteed.

Please allow at least three weeks for custom projects to ensure that there is ample time for design, compliance approval and production.

All Co-op Marketing forms that need to be completed can be found under the **Advisor Resources --> Co-op Marketing** section on the SaskWorks website or at saskworks.ca/advisor-resources/co-op-marketing

Any questions, contact Diana Hilderman, Communications Manager at dianahilderman@pfm.ca.

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WHAT WILL QUALIFY

SaskWorks Venture Fund has pre-designed co-op advertisement templates for print, radio, outdoor, washroom, and digital ads along with mail drop brochures and personalized brochures. These specially-designed ads will be accepted for reimbursement.

Other marketing projects will be considered. To qualify for approval, SaskWorks Venture Fund must be the primary focus of the advertising and receive a minimum of one-half of the space/time allotted. In addition, SaskWorks must be indicated as a partial sponsor.

THE PROCESS:

1. Complete a SaskWorks [Co-op Marketing Order Form](#) (no formal approval required at this stage).
2. SaskWorks will review your request within five business days of receiving the submitted form. If approved by SaskWorks, you will be provided with a mockup of your advertisement and be required to complete the [Pre-Approval Request Form](#).
3. In some cases, you may be asked to make revisions to your project prior to approval. Whether the changes are made by you or SaskWorks, you will have to re-obtain the approval of your compliance department.
4. Please ensure that all invoices associated with the project are billed in full to your dealer.
5. Upon completion of the project/advertising campaign, please complete a SaskWorks [Request for Reimbursement Form](#) and submit along with all applicable invoices and/or receipts. Please ensure that the form has been authorized by your compliance department.

Requests for reimbursement must be submitted within one month of the advertising's run date.

6. A reimbursement cheque will be issued to the dealer that you have indicated on your form. Reimbursements may only be paid to your dealer, not individual investment advisors or their personal companies.

FREQUENTLY ASKED QUESTIONS

- **Where can I obtain the required co-op advertising forms?**

Forms are accessible online at

www.saskworks.ca/advisor-resources/co-op-marketing/

- **Can my Pre-Approval Request be processed without the approval of my Compliance Officer?**

No. A Compliance Officer must provide approval on your request in order for it to be approved by SaskWorks.

- **The Request for Reimbursement Form asks for the "Amount Requested from SaskWorks." How should I fill this in?**

The maximum reimbursement payable by SaskWorks is 50% of your total expenditure. The amount requested from SaskWorks should be half of the amount you've indicated as your total project cost.

- **I lost one of my receipts. Can I still be reimbursed for this expenditure?**

SaskWorks will only reimburse expenses for which proof of expenditure (receipts, invoices, etc.) are provided.

For further assistance, please contact Diana Hilderman at (306) 541-8677 OR dianahilderman@pfm.ca.



- 1 To be eligible for reimbursement, the primary purpose of the expenditure must be to promote or to provide educational information concerning the sponsoring mutual fund company, SaskWorks Venture Fund. The sales communication must disclose, or persons attending a conference or event must be informed in writing, that the sponsoring mutual fund company, SaskWorks Venture Fund, has paid a portion of the cost.
- 2 Only reasonable out-of-pocket, direct costs and expenses, excluding internal salaries, overheads, travel, accommodations or personal incidental expenses are eligible for reimbursement.
- 3 All contributions from the sponsoring mutual fund company, SaskWorks Venture Fund, must not exceed 50% of the dealer's total direct costs.