

Advisor Co-op Marketing Guide

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:



Personalized Brochures: SaskWorks will imprint the current marketing brochures with your contact information free of charge. These can be ordered at any time throughout the year.



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.



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.



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



Washrooms: They have nowhere else to look, so why not make it an ad with your name and information? Choose from local restaurants, fitness facilities and education centres.



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



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.



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.



Seminar/Events: 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 December sell-out, September/ October campaign dates are recommended.

If you would like to participate please express your interest to **madisonwickenheiser@pfm.ca** or complete the online Order Form found at saskworks.ca.

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

For further assistance, please contact Madison Wickenheiser at (306) 502-5311 OR **madisonwickenheiser@pfm.ca**

WHAT WILL QUALIFY?

SaskWorks Venture Fund has pre-designed co-op advertisement templates for brochures, mail drops, newspaper/print, washrooms, outdoor, radio, television, and seminars. 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 **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.
- Request 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.