TO DO LIST

MAXIMIZE YOUR FCSI PROFILE

FCSI
FELLOW OF CSI

As a Fellow of the Canadian Securities Institute (FCSI®), you have an excellent opportunity to create awareness of your special accomplishment and to maximize its benefit for your professional reputation. This To Do List will help you ensure you can create broad awareness among your clients and prospects that you hold the most senior credential in Canadian financial services.

- [ ] Key internal departments (e.g., HR, Marketing, Compliance) notified
- [ ] IIROC and other professional membership organizations/associations notified
- [ ] Paper business cards and electronic vCards updated
- [ ] All company website references (intranet and Internet) updated
- [ ] External websites and social media (LinkedIn, Facebook, Twitter, Pinterest, etc.) updated
- [ ] Email signature updated
- [ ] Online and handout versions of bio updated
- [ ] Correspondence or email from manager/head of business sent to inform clients (draft provided)
- [ ] Third-party websites (i.e., related to social affiliations, board appointments) updated
- [ ] Internal and external company directory listings updated
- [ ] Standard correspondence signature (template) updated
- [ ] Alumni association(s) and alumni publication editor(s) notified
- [ ] Display and/or template advertisements (print, online) updated – include FCSI® logo
- [ ] Personal phone call to key members of professional/personal network
- [ ] Client/prospect premiums (e.g., calendars, pens) updated
- [ ] Personalized stationery (both workplace and private) updated
- [ ] All collateral materials (brochures, handouts, etc.) updated
- [ ] All presentation templates updated
- [ ] Staff trained to explain value of FCSI® to clients and prospects (key messages and Q&A)
- [ ] Other professional/personal conduits for self-promotion updated and/or notified

CANADIAN SECURITIES INSTITUTE
Credentials That Matter.
CSI