**CLIENT LETTER CONTENT**

**RE: My CIM Designation**

**Dear [client name],**

As we continue to work together to shape your financial future I have always made it a priority to ensure I offer the best service possible.

One of the designations that has helped me offer a higher level service is the Chartered Investment Manager designation (CIM®). This credential also allows me to make discretionary investment decisions on behalf of my clients after receiving their initial permission to do so.

It all starts with personalized plan, tailored to your goals, risk tolerance, and financial situation. The key benefit the CIM® provides is that it allows me to perform transactions as I strive to optimize returns on your investments, and, allows me to quickly mitigate any risk should it appear in a much more agile way without having to seek your approval on every transaction.

Additionally, the CIM® designation reflects that I have a deep understanding of advanced money management strategiesfor Canadian investors, and, can ensure that all transactions are compliant with Canadian regulations. Like always, everything I do is bound by a strict code of ethics – always ‘client first’.

I just wanted to let you know about this deeper level of service I am able to offer to my clients, and would love to discuss how this specifically relates to our business relationship, and how I can get my CIM® designation working for you.

To learn more: <http://bit.ly/learnaboutCIM> I look forward to our next meeting.

Sincerely,

**OUTBOUND EMAIL LETTER**

**Subject line: Why my clients should care about the CIM Designation**

**Dear [client name],**

As we continue to work together to shape your financial future I have always made it a priority to ensure I offer the best service possible.

One of the designations that has helped me offer a higher level service is the Chartered Investment Manager designation (CIM®). This credential also allows me to make discretionary investment decisions on your behalf after receiving your initial permission to do so.

It all starts with personalized plan, tailored to your goals, risk tolerance, and financial situation. The key benefit the CIM® provides is that it allows me to perform transactions as I strive to optimize returns on your investments, and, allows me to quickly mitigate any risk should it appear in a much more agile way without having to seek your approval on every transaction.

Additionally, the CIM® designation reflects that I have a deep understanding of advanced money management strategiesfor Canadian investors, and, can ensure that all transactions are compliant with Canadian regulations. Like always, everything I do is bound by a strict code of ethics – always ‘client first’.

I just wanted to let you know about this deeper level of service I am able to offer to my clients, and would love to discuss how this specifically relates to our business relationship, and how I can get my CIM® designation working for you.

To learn more: <http://bit.ly/learnaboutCIM>

I look forward to our next meeting.

Sincerely,

**LinkedIn & Social Blurb [Short Version]**

**About My CIM designation**

The CIM® or Chartered Investment Manager designation allows me to make discretionary investment decisions for clients who have approved me to do so.

This results in more responsiveness to risk, and a more proactive approach to managing my client’s portfolios.

To learn more: <http://bit.ly/learnaboutCIM>

**LinkedIn & Social Blurb [Long]**

**Some insight into the letters beside my name: CIM®**

The CIM® designation allows me to make discretionary investment decisions for my clients after receiving their initial permission to do so.

It allows me to make moves on behalf of my clients as I strive to optimize returns on their investments, and, allows me to quickly mitigate any risk should it appear in a much more agile way without having to seek approval on every transaction.

To learn more: <http://bit.ly/learnaboutCIM>

**RESUME BLURB**

**20XX – Attained the Chartered Investment Manager (CIM®) Designation**The CIM® enables the designation holder to perform discretionary investment transactions for Canadian investors, institutional investors and high-net-worth clients - bound by a strict code of ethics & fiduciary responsibility.

**CIM® INFOGRAPHIC**

**HOW TO USE THE CIM® INFOGRAPHIC IN YOUR MARKETING EFFORTS**

The infographic image included in your toolkit was designed to offer a high level summary of what the CIM® designation offers to clients. It has been purpose built to add visual interest and hopefully, some added share-ability, to any of your marketing initiatives.

Ways to use it:

* Add it into the body of an email you’re sending to clients to add some visual “pop” and potentially in place of a paragraph or two of text (clients will appreciate this)
* Use it in your Social Media posts as posts with images have proven to be almost twice as impactful
* Find a home for it on your website on your Bio page or in a Blog post
* Include it in the about section of your client presentations as a quick overview of how you CIM® can help them

However you choose to use this infographic, you won’t go wrong. It’s a great way to spark a conversation about the added benefits your CIM® offers the clients you serve.

**SOCIAL MEDIA POSTS**

We’ve adapted the full size infographic into a series of smaller, more focused ones that you can use intermittently as posts in your various social media streams. The vision for these is for you to add a short sentence or two about yourself, your practice and the CIM® Designation to accompany the infographic image you choose.

**PRINT ADS**

We’ve also included 3 full-size print ads requiring varying degrees of customization from the simple addition of your institution’s logo and your contact details to a more comprehensive ad layout that makes you and a quote of yours the star. We’ve provided the 2 most common editable design files for you to submit to your corporate design department or any graphic artist. Note for the “your picture here” ad you’re going to need to get your photograph professionally done on a clean white background.