



Social Investment Forum Membership Directory

Profile and Listing User Guide

SIF has moved to a new membership database system, which allows our members to manage their own records in the database that provides the online organizational profile in the Financial Services Directory. This brief guide provides step-by-step instructions on how you can update your member profile for the online directory.

March 2011

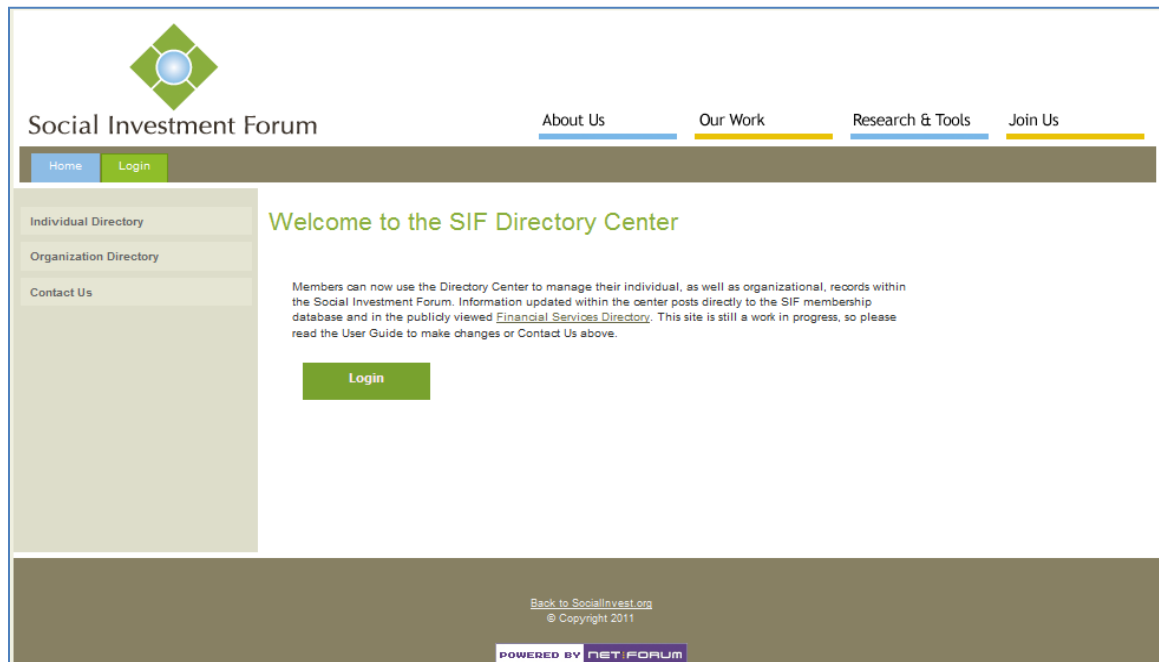
Table of Contents

The Basics	3
My Information	4
Edit Information	5
Change Picture	5
Change Password	5
Organization Information	5
Linked Organizations Information	6
Email Opt-Out	6
Organizational Member Listing	7
Edit Information	8
Change Picture	9
Manage Employees.....	9
Add Employee	10
Remove Employee	11
Professional Member Listing	11
Frequently Asked Questions	13

The Basics

The Social Investment Forum (SIF) administers membership records using Avectra, a membership software system. One component of this system is the onlineNetForum platform. Visitors to the online Financial Services Directory will click on www.socialinvest.org/directory which will transfer them the URL below:

<https://netforum.avectra.com/eweb/StartPage.aspx?Site=socialinvest.org&WebCode=HomePage>



Members have the ability to manage their own membership records through the NetForum platform. Professional members and primary contacts of institutional/organizational members are able to edit organizational information, manage employees, and rewrite business listing descriptions. The following chapters will guide you through the process step-by-step.

Login

The page you are attempting to access requires you to log in. Please provide your information below.

Primary E-Mail Address:

Password:

Remember Me

Go

[Forgot your Password?](#)

The user login is the email address your organization's primary contact chose for the employees of your organization.

The default password for first-time users is **Password1**. Once you log in, you will be prompted to change the password before continuing. The system is able to reset passwords by clicking on the "Forgot you Password?" link and entering the correct email address.

My Information

Once you have successfully entered the Directory Center, you will see a new item on the left-hand navigation menu called 'My Information'. After clicking on My Information, you will be taken to your profile. A box that says 'Image Not Available' will likely appear under your name, which is appropriate. As individual profile pictures will not be displayed in the online directory, the uploading of a picture is not necessary.

My Information

Click on the edit link below to modify your information.

Sylvia Panek

Customer ID: 000020

[Profile Information](#) | [\[Edit Information \]](#) | [\[Change Picture \]](#) | [\[Change Password \]](#)

Sylvia Panek Sylvia Panek
Assistant Director of Operations
Social Investment Forum
910 17th St. NW
Ste. 1000
Washington, DC 20006

Phone: (202) 872-5361
Fax: (202) 463-5125
E-mail: spanek@socialinvest.org
Web Site: (Not available)

Organization Information

[Social Investment Forum](#)
910 17th St. NW
Ste. 1000
Washington, DC 20006

Phone: (202) 872-5361
Fax: (202) 775-8686
Web Site: www.socialinvest.org
Primary Contact: [Meg Voorhes](#)

Have you changed your organization, or is this not your organization? [Click here.](#)

Edit Information

Edit My Information

Please edit your information in the form below:

Personal Information

Prefix:

^R First Name:

Middle Name:

^R Last Name:

Suffix:

Do Not Publish Info Online: ← Leave unchecked if Professional Member

Membership Information

Is Member: No

Receives Benefits: Yes Via Customer: Social Investment Forum Via Membership Type: Comp & Trade

First Name and Last Name fields are required in the Directory Center and noted with an ‘R’.

Make sure the ‘**Do Not Publish**’ box is checked if you are an organizational employee, i.e. institutional member of SIF. If you pay dues to the Social Investment Forum as an individual *Professional*, then make sure the box is unchecked, so that your information will be displayed in the Individual Directory for professionals.

Update all other contact information as necessary, making sure to keep the email address populated with a valid recipient. Remember to save changes.

Change Picture

Your individual profile will not be displayed in the online directory, so the uploading of pictures is not required.

Change Password

New password must be at least 6 characters long. We recommend a combination of alphanumeric characters and symbols for added security.

Organization Information

Your organizational contact information is listed. *NOTE: Although any employee can edit his or her individual information, only the Primary Contact is able to make changes to the Organization Information section.* Edits to Organization Information are covered in the “Organizational Member Listing” section of this guide on page 7.

If you have changed organizations, please send an email to info@socialinvest.org with the following information:

- Old organization
- New organization
- Date that this change becomes effective

If you have changed organizations, but are currently the Primary Contact for your old organization, please indicate a new Primary Contact from the list of employees in order for the change to become effective. To add a new employee, please refer to page 10.

Linked Organizations Information

Only Primary Contacts are able to visit and edit their Organization information via this section. Read the “Organizational Member Listing” section for more information.

Email Opt-Out

You may select any of four categories to unsubscribe from:

- Membership Renewals
 - * Primary Contacts are requested to remain on this list.
- Marketing Information
- Notice E-mail
 - * Primary Contacts are requested to remain on this list.
- Welcome Email

Organizational Member Listing

The Primary Contact is the only employee able to make edits to the Organizational information and to manage employees. To begin, click on your organization's name listed under **Linked Organization Information**.



Organization Information

[Social Investment Forum](#)
910 17th St. NW
Ste. 1000
Washington, DC 20006

Phone: (202) 872-5361
Fax: (202) 775-8686
Web Site: www.socialinvest.org
Primary Contact: [Meq Voorhes](#)

Have you changed your organization, or is this not your organization? [Click here.](#)

Linked Organizations Information

You are the primary contact for the following organizations. Click on the name to view organization's information.

- [Social Investment Forum](#)

Are you the primary contact for an organization that is not listed above? [Click here.](#)

Organization Information

Organization information is presented below:

Social Investment Forum
Customer ID: 60119

[Profile Information](#) | [\[Edit Information \]](#) | [\[Change Picture \]](#) | [\[Manage Employees \]](#)



Social Investment Forum
910 17th St. NW
Ste. 1000
Washington, DC 20006

Phone: (202) 872-5361
Fax: (202) 775-8686
E-mail: (Not available)
Web Site: www.socialinvest.org

Primary Contact Information | [\[Request Removal \]](#)

[Meq Voorhes](#)
910 17th St. NW
Ste. 1000
Washington, DC 20006

Phone: (202) 872-5361
Fax: (202) 775-8686
E-mail: mvoorhes@socialinvest.org

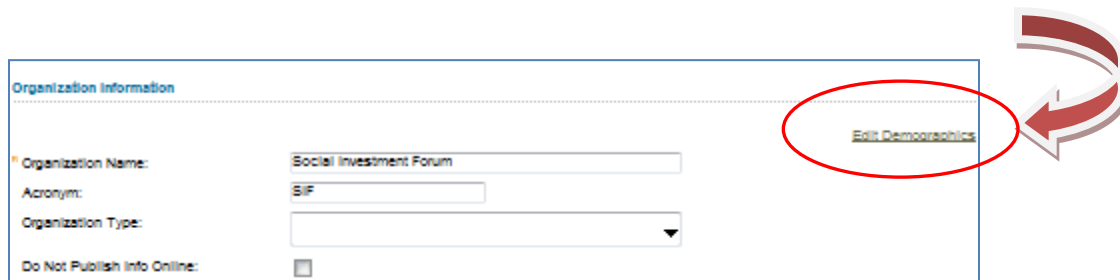
Parent Organization Information

(This information is not available)

In the Organization Information profile, the Primary Contact is able to **Edit Information, Change Picture, Manage Employees** and **Request Removal** of themselves as the primary contact.

Edit Information

The Organization Name, Primary Address, Primary Business Phone and Primary Business Fax are required fields. After completing edits to general contact information, make sure to select Edit Demographics.



Organization Information

Organization Name: Social Investment Forum

Acronym: SIF

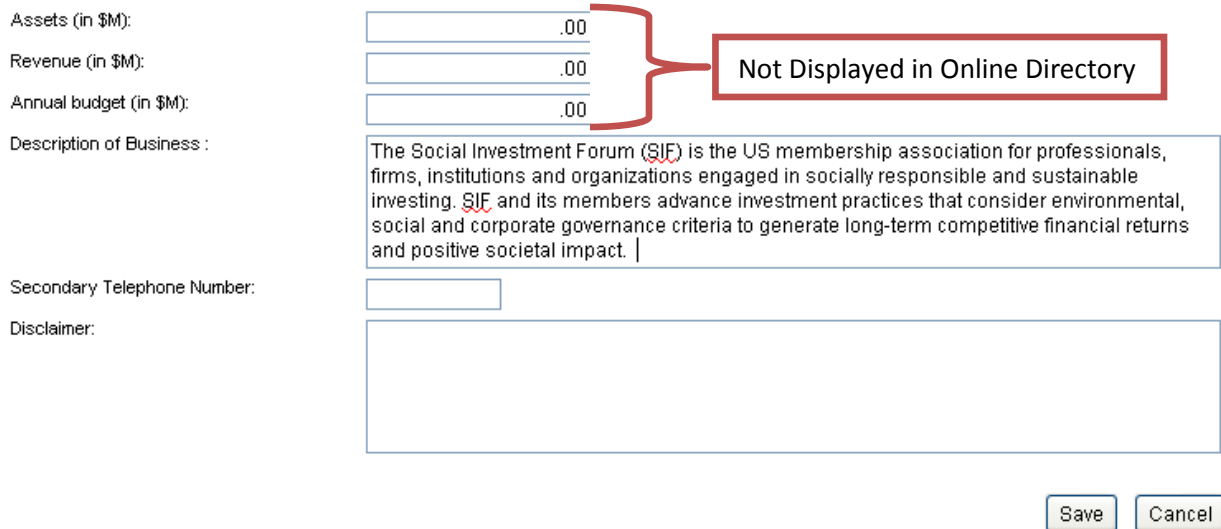
Organization Type: [Dropdown]

Do Not Publish Info Online:

[Edit Demographics](#)

Update the relevant demographic information for your organizational profile. *Note that only the Description of Business, Secondary Telephone Number and Disclaimer display online.*

Demographic Information



Assets (in \$M): [Input] .00

Revenue (in \$M): [Input] .00

Annual budget (in \$M): [Input] .00

Description of Business :
The Social Investment Forum (SIF) is the US membership association for professionals, firms, institutions and organizations engaged in socially responsible and sustainable investing. SIF and its members advance investment practices that consider environmental, social and corporate governance criteria to generate long-term competitive financial returns and positive societal impact. |

Secondary Telephone Number: [Input]

Disclaimer: [Input]

Save Cancel

After completing edits to the organization profile, including demographics, click on Save.

Back in Edit Organization Information, scroll to the bottom and click on Save Organization to validate changes made.



Change Picture

Institutional members may upload a logo for their business listing. For more information, please contact Membership Services.

Image Upload

Please note: Image must be in JPEG or GIF format and not bigger than 100KB.




Image File:

Description:

Uploaded File on Server: ce867a92-61fa-4ccd-882a-ea3788e4455d.JPG

Manage Employees

Primary contacts may Add, Search and Request Removal of employees from the organizational profile who are to receive membership benefits, such as conference discounts, access to listservs, etc.

Add Employee

Personal Information

Prefix:

^R First Name:

Middle Name:

^R Last Name:

Suffix:

Do Not Publish Info Online: Leave unchecked if Professional Member

Add the employee's contact information, noting that fields with an 'R' are required. Make sure the 'Do Not Publish Info Online' box is selected unless the employee pays dues as a Professional Member.

E-Mail Address & Personal Web Site Information

A primary e-mail address is required for using this web site. It will be used as the login ID to be able to log in to the site.

^R Work E-Mail: Primary:

Other E-Mail (1): Primary:

Other E-Mail (2): Primary:

Web Site:

Password needs to be at least 6 characters in length.

^R Password:

^R Confirm Password:


When entering the primary work email address, record the naming convention used in your files if your company allows multiple aliases, e.g. john.doe@, jdoe@ or john@. The work email address is used as the ID login for the Directory Center.

The suggested default password is **Password1**. Once the employee logs in, they will be prompted to change to a password of their choice before continuing. The system is able to reset passwords by clicking on the "Forgot you Password?" link.

Remove Employee

Search Results / Request Employee Removal

Click on any employee to view the employee's details. You can also select employees that are no longer with your organization by checking the checkbox to the left and then submit the selected list to us and we will remove the link between them and your organization. Please allow 24 hours.



ID	LastName	FirstName	Is Member	Receives Benefits	Member Type	Expire Date	E-mail
<input checked="" type="checkbox"/>	001100	DeSimone	Peter				pdesimone@socialinvest.org
<input type="checkbox"/>	001040	Lang	Kristin	✓			klang@socialinvest.org
<input type="checkbox"/>	000020	Panek	Sylvia	✓			spanek@socialinvest.org
<input type="checkbox"/>	000010	Voorhes	Meg	✓			mvoorhes@socialinvest.org
<input type="checkbox"/>	60119-001	Woll	Lisa	✓	Professional	12/31/2010	lwoll@socialinvest.org

Select the employee and click on Submit List for Removal. Please allow twenty-four hours for the change to validate.

Professional Member Listing

Personal Information

[Edit Demographics](#)

Prefix:

First Name:

Middle Name:

Last Name:

Suffix:

Do Not Publish Info Online:

Membership Information

Is Member: Yes Membership Type: Professional Status: Active

Join Date: 06/29/2000 Effective Date: 12/31/2009 Expire Date: 12/31/2011

Dues-paying individual professional members are listed in the Individual Directory. To update the business description and/or disclaimer information for your individual profile, click on **Edit My Information**. Locate the upper right-hand corner, click on **Edit Demographics**.

Update the relevant demographic information for your organizational profile.

Demographic Information

Financial Planner/Advisor:

Business Description:

Disclaimer:



After completing edits to the organization profile, including demographics, click on Save.

Frequently Asked Questions

Q: Is it possible for the primary contact to select the email listservs to which the other firm contacts are added, or does each employee do that on his or her own?

A: The listservs are not directly linked to Avectra database and online directory. Please visit the Member Center for more information on joining email discussion groups (listservs) at the Social Investment Forum.

Q: When does the 'Do Not Publish' box need to be checked or unchecked?

A: When you are an individual who pays professional dues to the Social Investment Forum, a membership benefit is having your name and public profile listed and searchable in the Individual Directory. That is the only instance where the 'Do Not Publish' box should be unchecked, so that your name will be displayed.

Q: Is there any reason for a non-primary contact to fill out "My Profile" information? Is it displayed anywhere else, or does it get saved within the Avectra database?

A: Yes. Even though organizational employees (both Primary and Non-primary) are not displayed in the online Financial Services Directory, managing your profile information will guarantee that you are in the Avectra database and receive membership benefits such as conference discounts, access to publications, etc. It enables Social Investment Forum to direct renewal notices and other important notices to the appropriate contact at the member organization.

Q: Is there a limit to the number of employees I can enter in to the database?

A: Yes. We limit the number of employees to 30 that can be added to an organizational profile for institutional dues-paying members.