

## Welcome to the CI GAM Marketing Hub

To view the monthly profiles and financial statements including Fund Facts, please visit the respective page for each fund series on [ci.com](https://ci.com).

For Applications & Forms [click here](#).

ORDER NOW

## CI GAM MARKETING HUB & PRINT SERVICES PORTAL

## CI ONLINE ORDER FORM - FAQ

### How do users register for the Online Order Form (OOF)?

1. Access the Online Order Form via: <https://ci.lmgclient.com/gam/login>
2. Enter your email address as your username
3. If you are not registered, you will be prompted to register
4. Create a password (first time registration)

If you have any issues with registration or site access, please reach out to the CI Client Services team at 1-800-203-7982 Ext. 6 or [ciclientservices@lmgroup.com](mailto:ciclientservices@lmgroup.com)

## CI ONLINE ORDER FORM - FAQ

### Quick Guides for CI ONLINE ORDER FORM

1. [CI Online Portal-Training Manual](#)
2. [CI Custom Kit-Quick Guide](#)
3. [CI Adhoc Products-Quick Guide](#)

If you have any issues with registration or site access, please reach out to the CI Client Services team at 1-800-203-7982 Ext. 6 or [ciclientservices@lmgroupp.com](mailto:ciclientservices@lmgroupp.com)

## CI ONLINE ORDER FORM - FAQ

### Who oversees the Online Order Form and who is Lowe-Martin?

The new platform is managed by the CI Marketing team. CI partnered with an external vendor named Lowe-Martin to handle all print requests and the delivery of marketing materials.

The CI Distributions team now only handles requests for the printing of Fund Facts (FF) and Monthly Profiles (MP) – they cannot help with any other requests. To print FF's or MP's please send an email to [Distrib@ci.com](mailto:Distrib@ci.com).

**Please note: All forms and applications now reside on [ci.com](https://ci.com) under the Advisor Resources tab. They are ungated and accessible for download at any time.**

## CI ONLINE ORDER FORM - FAQ

### What is available on the new Online Order Form?

- Advisors and internal CI employees will be able to order a wide variety of marketing materials and premium/gift items.
- If you navigate to the “Catalogue” in the menu you can view all categories. This includes content/brochures related to all product lines, commentaries across asset classes, portfolio management information, educational materials pertaining to different account types, Advisor Consulting materials (TREP and Practice Management), and one-page Investment Resource materials (such as overview of fee structures, calculating investment returns, benefits of active management, and much more).
- Reasons to Own pieces are not listed on the Order Form. You can use the “Adhoc Products” custom print functionality as a workaround.
- The “Adhoc Products” functionality allows you to upload custom items for print delivery
- You can build custom kits by selecting the “Custom Kits” category
- You can order premium items and merchandise under the “Gifts” category
- You can also order signage for trade shows under the “Signage” category

## CI ONLINE ORDER FORM - FAQ

### What delivery options are available when ordering materials?

You can order Print on Demand (POD) items and stocked inventory items for print delivery.

If you only want the PDF, simply use the download button in your browser's PDF viewer once a product is viewed in PDF format.

Print delivery is self-explanatory. Not all items are available for electronic or print delivery. For example, all commentaries are only available in PDF format (excluding the managed solution quarterly portfolio reviews), and pocket folders are print delivery only.



## CI ONLINE ORDER FORM - FAQ

### How do I cancel my order?

You can cancel your order within 30 minutes of receiving the email confirmation by contacting Client Service.

Call: 1-800-203-7982 Ext. 6

Email: [ciclientservices@lmgroup.com](mailto:ciclientservices@lmgroup.com)



## CI ONLINE ORDER FORM - FAQ

How much notice do you need to give on a special requests/ standard orders?

### Special Requests

For special requests you will need to reach out to the CI Marketing Team at least 4-5 business days before the required date. We will need to coordinate with the Lowe-Martin team and develop print files which could take some time.

### Standard Orders

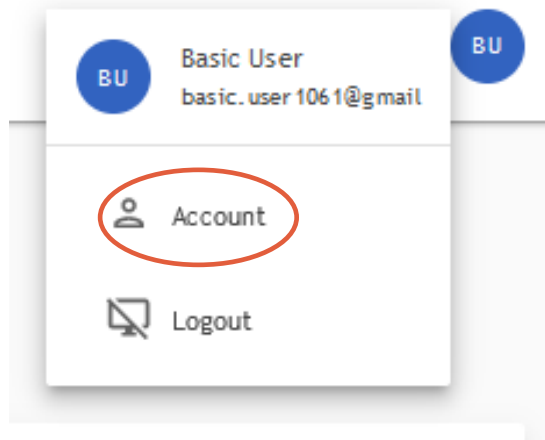
Orders submitted prior to 4:00 PM EST will be processed the next business day. Please allow 1-2 business days for delivery to Ontario and Quebec, 3-5 business days for other provinces. If this is a RUSH order, please provide need-by date in the Notes field of the checkout page. A client service representative will contact you if there are any questions or concerns.



## CI ONLINE ORDER FORM - FAQ

### How do you know the status of your order?

When you place an order, you will receive an order confirmation. Once the order is shipped, you will receive a shipping confirmation email with tracking details. Additionally, if you navigate to “Account” beneath your profile icon it will indicate the date when the order was shipped.



## CI ONLINE ORDER FORM - FAQ

### Would an advisor's login information on the OOF be the same as other CI platforms?

Assante advisors or users can be logged in directly into OOF via Single Sign-On (SSO).

GAM advisors or users will have the opportunity register directly with via the link below.

CI GAM Marketing Hub URL: <https://ci.imgclient.com/gam/login>

If you have any issues with registration or site access, please reach out to the CI Client Services team at 1-800-203-7982 Ext. 6 or [ciclientservices@imgroup.com](mailto:ciclientservices@imgroup.com)



## CI ONLINE ORDER FORM - FAQ

Is it better to use the order form on a specific search engine?

Yes, for optimal browsing experience it is recommended to use either Chrome, Edge, or Firefox.

Safari should be avoided as there tends to be glitches.

## CONTACT AND SUPPORT

- Client Services
  - Call: 1-800-203-7982 Ext. 6
  - Email: [ciclientservices@imgroup.com](mailto:ciclientservices@imgroup.com)
  - Monday to Friday 9am to 5pm EST

### Lowe-Martin – Toronto

5990 Falbourn Street, Mississauga ON L5R 3S7

930 Britannia Road East, Unit Z, Mississauga ON L4W 5M7