

# Marketing your services within professional guidelines

**O**n December 18, 2007, the new logo of the Appraisal Institute of Canada (AIC) was unveiled to the membership. The new logo is described as vibrant, strong, modern, proactive and confident, and members are encouraged to make use of the new logo in their practices. This is an excellent recommendation, but sometimes issues arise with respect to member advertising, which can include Internet websites and the Yellow Pages. In some cases, Internet websites are created, but then are not updated, and Yellow Page advertising may be overzealous.

The Counsellor of Professional Practice usually deals directly with advertising infractions, but some cases work their way through the Professional Practice Group. The Adjudicating Committee occasionally deals with files that involve misleading advertising. Misleading Yellow Page advertising has included stating that all employees are members of the AIC when, in fact, they are not, or claiming qualifications before they are actually earned. A recent Adjudicating Committee hearing dealt with a misleading website. Among other things, information on the website overstated levels of experience and indicated that all of the employees were 'bonded' by the AIC. It was ordered shut down, and the member complied.

The Counsellor recently dealt with another incident involving a website. This issue was quite serious and required changes be made to a website that was inadvertently contributing to a mortgage fraud scheme. In this case, a retired member was listed as an employee, and a former employee was using that and the digital signature to his advantage to convince a lender



that the appraiser was still practicing, thereby submitting fraudulent appraisal reports.

At this point, it is worthwhile to review some of the regulations that influence advertising claims for AIC members. The Comments section of the *Ethics Standard Rules of the Canadian Uniform Standards of Professional Appraisal Practice (CUSPAP)* addresses these issues, which are summarized as follows:

*Note: Some of these comments have been edited and some sentences have been deleted. Members are referred to the most recent 2008 version of CUSPAP for further details.*

5.1.3 Only members holding the grade or rank of AACI are entitled to use of the term 'Accredited Appraiser.'

5.1.4 Only members holding AACI, P. App, CRA

or P.Val. designations are entitled to use the term 'designated member.'

5.4.6 Promoting the Candidate membership category in such a way that it might be perceived as a designation is misleading. AIC Candidate members must refrain from using initials or abbreviations that might be interpreted as relating to a designated status, i.e., CAN, as this is not an AIC designation, but refers to status within the Appraisal Institute of Canada.

5.4.7 AIC Candidates are able to identify themselves as a Candidate member of the Appraisal Institute of Canada (AIC). AIC Candidate members may identify that they are working under the mentorship of a designated member of the Institute and identify the mentor's name and designation.

- 5.6.5 It is unethical for affiliate, associate or student members to hold themselves out in any way as a practising member of the Institute.
- 5.4.1 Members pledge to avoid advertising or solicitation which is false, misleading, exaggerated or otherwise contrary to the public interest.
- 5.4.2 To serve the public effectively, members must properly and accurately inform the public as to the functions of the profession and the qualifications and credentials of its members. Members of the Institute may use advertising media not only to inform prospective clients and the public that their professional services are available, but also to advise such parties as to the range, nature and cost of such professional services.
- 5.4.3 Members must ensure however, that such advertising is not misleading or calculated to create unrealistic expectations. In promoting an appraisal practice, members are required to take particular care that they observe only the highest standards of objectivity and impartiality.
- 5.4.5 No one may refer to or use the name of the Appraisal Institute of Canada or its professional designations and trademarks in a misleading or deceptive manner. For example, the name of the Institute or its designations may be used to refer factually and accurately to an individual appraiser's membership, but such usage must never suggest that a business organization is a member. These designations and their trademarks are awarded only to an individual member and must

never be used to give the impression that a business organization holds any designation. Further, any advertisement, leaflet, pamphlet, brochure or other material used for promotional or solicitation purposes which refers to the Institute or to the Institute's professional designations or trademarks must be dignified, conservative and in keeping with the highest professional standards. The use of the Institute logos will be determined by the Board of Directors.

To summarize, members are encouraged to use professional quality advertising, but, at the same time, to be aware of the regulations that govern advertising conduct. Members must ensure that advertising including websites is accurate and current so as to avoid potential AIC disciplinary action, or, as the previous case

cited, the potential for innocent participation in a mortgage fraud scheme and possible criminal investigations. It is good practice to check all advertising materials, including website pages, on a regular basis to ensure they are up to date and that the employee membership information is accurate. 🇩🇪

### Adjudicating Committee

Peter Lawrek, AACI, P. App – Chair

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**NOTARIUS**

**ADHÉRER À LA SIGNATURE NUMÉRIQUE OFFICIELLEMENT RECONNUE PAR L'ICA C'EST :**

**S'AFFICHER EN TANT QUE MEMBRE EN RÉGLE DE L'INSTITUT**

**ASSURER LA SÉCURITÉ DE VOS DOCUMENTS ÉLECTRONIQUES**

**ACCROÎTRE VOTRE POTENTIEL DE RENTABILITÉ**

**RENFORCER SON IMAGE PROFESSIONNELLE**

**POUR PLUS DE DÉTAILS, CONTACTEZ NOTARIUS**

Sans frais : **1 800 567-6703**  
 Site Web : [www.notarius.com](http://www.notarius.com)

**ADOPTING A DIGITAL SIGNATURE OFFICIALLY RECOGNIZED BY THE AIC MEANS:**

**CONFIRMING THAT YOU'RE A MEMBER IN GOOD STANDING OF THE INSTITUTE**

**ENSURING THE SECURITY OF YOUR ELECTRONIC DOCUMENTS**

**INCREASING YOUR PROFITABILITY POTENTIAL**

**REINFORCING YOUR PROFESSIONAL IMAGE**

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