



Building a strong profession today, for tomorrow

## 2014 Continuing Education Courses

### (FPSC-approved CE Activities)

Dear Member,

Please see below our list of Continuing Education courses available for 2014 which are now FPSC-approved CE Activities and are not subject to an FPSC audit. As part of your membership benefits, you are entitled to select up to three (7 credit) courses and one (4 credit) course that can be used towards your continuing education requirements. Upon successful completion of three (7 credit) courses and one (4 credit) course, you will be eligible for 25 FPSC verifiable credits as required by the FPSC. CE courses ordered and registered for 2014 must be completed by December 31, 2014 to comply with FPSC CE requirements. All CE courses are available in online format with the option to print the material directly from your computer. The same CE title may not be taken two years in a row.

#### Seven Credit Courses (Select up to 3)

- ◆ Corporations
- ◆ Current Trends and Issues in Financial Planning
- ◆ Death and Taxes
- ◆ Deductions from Business and Property Income
- ◆ Employer Sponsored Pension Plans
- ◆ Estate Planning in Special Situations
- ◆ Family Property and Other Issues
- ◆ Family Relationships and Support Obligations
- ◆ Investment Risk Evaluation
- ◆ Life Insurance Products, Issues and the Industry
- ◆ Living Wills, Property Interests, Intestacy and Probate
- ◆ More Taxation of Capital Property
- ◆ Personal Trusts
- ◆ Proprietorships and Partnerships
- ◆ Risk of Death
- ◆ Risk of Disability and Accident and Sickness Insurance
- ◆ Taxation of Capital Property
- ◆ Taxation of Property Income
- ◆ Wills and Power of Attorney for Property
- ◆ Anti-Money Laundering and Terrorist Financing
- ◆ Know Your Client and Risk Management, Compliance and Sales and Trading Conduct, Ethics

#### Four Credit Courses (Select 1)

- ◆ The Structure of Bonds and Debentures
- ◆ Fundamental and Technical Analysis
- ◆ Financial Derivatives

You may also be able to claim insurance CE credits where applicable.



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## CE Credits for Maintaining Your CFP® Designation

CIFPs offer a comprehensive suite of pre approved CE titles that will allow you to meet your annual continuing education requirements to maintain your CFP® designation. Upon successful completion of three (7 credit) courses and one (4 credit) course, you will be eligible for 25 FPSC verifiable credits as required by the FPSC. CIFPs will forward a copy of your CE activities to the FPSC for audit purposes, if you would like them to appear on your FPSC CE Dashboard you must enter them yourself.

## CE Credits for IIROC licensed Advisors

Complete the CIFP Securities Compliance Principles Program - Cycle 5 to earn your 12 compliance CE credits. The courses cannot be ordered individually, they must be taken together as the program. With this program, you can claim seven (7) FPSC verifiable credits\*. Please note you cannot claim the same title in consecutive cycles.

The CIFP Securities Compliance Principles Program - Cycle 5 includes:

- Anti-Money Laundering and Terrorist Financing *New*
- Know Your Client and Risk Management, Compliance and Sales and Trading Conduct, Ethics


## CE Credits for Insurance

Each course excluding the CIFP Securities Compliance Principles Program - Cycle 5 courses and the three (4 credit courses) qualifies for eight (8) technical CE credits for your insurance license with the following exceptions.

**Alberta**, all courses qualify for AIC credits 8 Life each, in addition, the following courses also qualifies for eight (8) A&S credits.

- Corporations
- Deductions from Business and Property Income
- Living Wills, Property Interests, Intestacy and Probate
- Proprietorships and Partnerships
- Risk of Disability and Accident and Sickness Insurance (8 A&S Only)

**British Columbia** only Life Insurance Products, Issues and the Industry, Risk of Death and Risk of Disability and Accident and Sickness Insurance qualifies for eight (8) Life Credits each.

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