



Building a strong profession today, for tomorrow

## 2017 Continuing Education Courses

### (FPSC-approved CE Activities)

Dear Member,

Please see below our list of Continuing Education courses available for 2017 which are all FPSC-approved CE Activities and reported automatically to FPSC so you won't have to do anything if you get all your credits from us and are selected for their random audit. As part of your membership benefits, you will receive the "Professional Responsibility" course "Ethical Conduct for CFP® Professionals" and are entitled to select up to three eight (8) credit courses (you may swap one of these for 2 four credit courses if desired) to complete your 25 credits of continuing education requirements with FPSC. Upon successful completion of each course, you will be awarded the CE credits.

### "Financial Planning" Courses (unless indicated each is worth 8 credits)

- Alternative Trading and Income Strategies
- Americans in Canada and Canadians in America
- Anti-Money Laundering and Terrorist Financing
- At the Nexus of Debt and Wealth
- 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
- Financial Derivatives (4 Credits)
- Fundamental and Technical Analysis (4 Credits)
- FOREX and the Retail Investor *new*
- Human Nature and Investment Decisions
- Income Tax Planning: Not as Taxing as You May Think
- Investment Risk Evaluation
- Know Your Client and Risk Management, Compliance and Sales and Trading Conduct, Ethics
- Life Insurance Products, Issues and the Industry
- Living Wills, Property Interests, Intestacy and Probate
- More Taxation of Capital Property
- Personal Trusts
- Portfolio Theory and Asset Management
- Principles of Annuities
- Proprietorships and Partnerships
- Risk of Death
- Risk of Disability and Accident and Sickness Insurance
- Tax Planning in the Era of Trudeau *new*
- Taxation of Capital Property
- Taxation of Property Income
- The Family Business – Tax Issues & Succession Planning *new*
- The Structure of Bonds and Debentures (4 Credits)
- Why Monetary Policy Has Become Important – 3 Possible Cures
- Wills and Power of Attorney for Property



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## “Professional Responsibility” Course

- Ethical Conduct for CFP® Professionals (1 Credit)

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

## 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 (8 credit) courses and one Ethics (1 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 courses ordered and registered for 2017 must be completed by December 31, 2017 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.

## CE Credits for IIROC licensed Advisors

Complete the CIFP Securities Compliance Principles Program - Cycle 6 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 eight (8) FPSC verifiable credits\*. Please note you cannot claim the same title in consecutive cycles.

The CIFP Securities Compliance Principles Program - Cycle 6 includes:

- Anti-Money Laundering and Terrorist Financing
- 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 6 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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