

## 2020 Continuing Education Courses

### (FP Canada approved CE Activities)

Dear Member,

CIFPs offers 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 two Professional Responsibility (1 credit) course, you will be eligible for 26 FP Canada verifiable credits as required by FP Canada. If you would like these CE activities to appear on your FP Canada CE Dashboard, you must enter them yourself. CE courses ordered and registered for 2020 must be completed by December 31, 2020, to comply with FP Canada CE requirements. All CE courses are available in an 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.

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

- Alternative Trading and Income Strategies
- Americans in Canada and Canadians in America
- At the Nexus of Debt and Wealth
- Corporations
- Current Trends and Issues in Financial Planning (*updated annually*)
- Death and Taxes
- Deductions from Business and Other 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)
- FOREX and the Retail Investor
- Fundamental and Technical Analysis (4 Credits)
- Guaranteed, Interest-producing Investments (4 Credits)
- Human Nature and Investment Decisions
- Income Tax Planning: Not as Taxing as You May Think
- Investment Risk Evaluation
- Life Insurance Products, Issues, and the Industry
- Living Wills, Forms of Property Interests, Intestacy, and Probate
- Making Use of Tax Advantages (4 Credits)
- More Taxation of Capital Property
- Mutual Funds (4 Credits)
- Navigating the Longevity Journey - How to Stay 2 Steps Ahead *New*
- Personal Trusts
- Planning for a Tax Efficient Retirement
- Portfolio Theory and Asset Management
- Principles of Annuities
- Proprietorships and Partnerships
- Retirement Income Decisions
- Retirement Savings System in Canada *New*
- Retirement: Will they be your Golden Years?
- Risk of Death
- Risk of Disability and Accident and Sickness Insurance
- Smoke and Mirrors - Is the Canadian Middle Class Really Better Off *New*

- Socially Responsible Investing
- Tax Planning in the Era of Trudeau
- Tax Planning Today - Helping the One Percent and Those Who Want to Be in It *New*
- Taxation of Capital Property
- Taxation of Property Income
- The Family Business - Tax Issues and Succession Planning
- The Structure of Bonds and Debentures (4 Credits)
- Why Monetary Policy Has Become Impotent - 3 Possible Cures
- Wills and Power of Attorney for Property

#### **“Professional Responsibility” Course**

- Ethical Conduct for CFP® Professionals – Scenario Set I (1 Credit)
- Ethical Conduct for CFP® Professionals – Scenario Set II (1 Credit)
- Ethical Conduct for CFP® Professionals – Scenario Set III (1 Credit)
- Ethical Conduct for CFP® Professionals – Scenario Set IV (1 Credit)
- Ethical Conduct for CFP® Professionals – Scenario Set V (1 Credit)

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

#### **CE Credits for IIROC licensed Advisors**

Complete the CIFP Securities Compliance Principles Program - Cycle 8 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) FP Canada verifiable credits\*. Please note these are pending recertification and you cannot claim the same title in consecutive cycles.

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

**Alberta**, all courses (except Risk of Disability and Accident and Sickness Insurance) qualify for 8 Life AIC credits, in addition, the following courses also qualify for eight (8) A&S AIC credits.

- Living Wills, Property Interests, Intestacy and Probate (8 Life and 8 A&S)
- 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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