



2011 Continuing Education Courses

Dear Member,

Please see below our list of Continuing Education courses available for 2011. As part of your membership benefits, you are entitled to select up to three (3) courses that can be used towards your continuing education requirements. Upon successful completion of any three CE courses, you can claim a maximum of 21 FPSC verifiable credits*. You may also be able to claim insurance CE credits where applicable. Individual courses earn eight (8) CE credits each, not to exceed 21 CE credits cumulatively. CE courses ordered and registered in 2011 must be completed by December 31, 2011 to comply with FPSC CE requirements. All CE courses are available in online format only with the option to print the material directly from your computer as you deem appropriate.

- ◆ 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 *New*
- ◆ Risk of Disability and Accident and Sickness Insurance *New*
- ◆ Taxation of Capital Property
- ◆ Taxation of Property Income
- ◆ Wills and Power of Attorney for Property

New for IIROC licensed Advisors

Complete the CIFP Securities Compliance Principles Program - Cycle 4 to earn your 12 compliance CE credits. Also, select any two (2) of the above courses to meet your FPSC* and insurance CE credits (where applicable).



Building a strong profession today, for tomorrow

The CIFP Securities Compliance Principles Program - Cycle 4 includes:

- ◆ Know Your Client and Risk Management
- ◆ Compliance and Sales and Trading Conduct
- ◆ Ethics

CE Credits for Maintaining Your CFP® Designation

CIFPs offers a comprehensive suite of CE titles that will allow you to meet your annual continuing education requirements to uphold your CFP designation*. Upon successful completion of any three CE courses, you can claim a maximum of 21 FPSC verifiable credits*. The IIROC compliance program when combined with two regular CE courses will enable you to claim 21 FPSC verifiable CE credits*.

CE Credits for IIROC Compliance

When the CIFP Securities Compliance Principles Program - Cycle 4 is successfully completed, you will earn 12 IIROC compliance 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*.

CE Credits for Insurance

Each course excluding the CIFP Securities Compliance Principles Program - Cycle 4 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)

Manitoba 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.

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.

* CIFP/CIFPs creates and/or sponsors its educational offerings in consideration of the continuing education guidelines set by the Financial Planning Standards Council (FPSC). It is the responsibility of the CFP professional to assess the appropriateness of this education content for purposes of claiming CE credits. Claims for CE credits are subject to review and approval by FPSC.