



EMPOWERING AN INDUSTRY

Why institutions work with IFSE



YOUR PARTNER IN
FINANCIAL SERVICES EDUCATION

VOTRE PARTENAIRE DANS
L'ÉDUCATION DES SERVICES FINANCIERS

WHO IS IFSE?

Regulator-approved
education provider to
the Canadian financial
services industry



Supplier of custom
learning solutions
since 1967

1967

A not-for-profit
organization offering
practical, affordable
learning



The educational arm of
the Investment Funds
Institute of Canada
(IFIC)

A proven leader in
financial services
training

WHAT IFSE OFFERS

Group training and individual courses for corporate clients and academic partners

Standard courses for individuals and specially tailored programs for institutions

Proficiency, licensing and continuing education courses for industry professionals

Wide range of general and niche courses

INVESTMENTS & BANKING

- Canadian Investment Funds Course (CIFC)
- Branch Managers' Examination Course (BM)
- 90 Day Training Program for Mutual Fund Dealing Representatives
- Canadian Investment Funds Operations Course (CIFOC)
- Labour Sponsored Investment Funds Course (LSIF)
- Officers', Partners' and Directors' Course (OPD)
- Mutual Fund Dealer Compliance Course (MFDC)
- Canadian Deposits Self-Study Course (CDC)

INSURANCE

- Life License Qualification Program (LLQP)
- Accident and Sickness Course

EXEMPT MARKET

- Exempt Market Proficiency Course (EMP)
- Officers', Partners' and Directors' Course (OPD)
- Ethics for Exempt Market Dealer Representatives

CE PROFESSIONAL DEVELOPMENT

- Segregated Funds
- Exchange-traded Funds Course
- Ethics for Insurance Professionals
- Tax-efficient Investing
- Leveraging for Investments
- Client Relationship Model Phase 2 (CRM2)

OUR FLAGSHIP COURSES

A purple square with a stylized white line graph showing an upward trend.

**CANADIAN
INVESTMENT
FUNDS COURSE
(CIFIC)**

A teal square with a stylized white line graph showing an upward trend.

**LIFE LICENSE
QUALIFICATION
PROGRAM
(LLQP)**

A brown square with a stylized white line graph showing an upward trend.

**EXEMPT MARKET
PROFICIENCY
COURSE
(EMP)**



WHY CHOOSE IFSE?



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Financial Institutions and Academic Partners rely on IFSE for:

- Industry-leading online learning delivery
- Highly competitive pricing for standard and customized training
- Superior high-touch, end-to-end customer service support
- Advanced technology LMS solution capability – let us administer your learning management
- You can easily follow your employees' or students' progress through our real-time reporting platform

Developing
employees' knowledge
and skills gives firms a
competitive advantage

Developing students'
knowledge and skills
helps advance their
careers

REAL-TIME REPORTING



My Classrooms >> Self Assessment Results

Organization: Top College
Instructor: ABCD1234 Instructor
Number: 123456

Course: Canadian Investment Funds Course - Academic Partners
Contract: Top College - Canadian Investment Funds Course (CIFIC)

Show Results From: First Attempt
Show Results For: < --- All Students --- >

Below is the list of Self Assessment results for the criteria you have supplied.

Student	Practice Exam	Unit 1	Unit 2	Unit 3	Unit 4	Unit 5	Unit 6	Unit 7	Unit 8	Unit 9
Adams, David (1234567)	82.0%	60.0%	60.0%	80.0%	90.0%	80.0%	70.0%	80.0%	80.0%	50.0%
Brown, Amanda (678910)	35.0%	80.0%	60.0%	90.0%	60.0%	90.0%	70.0%	60.0%	80.0%	30.0%
Chang, Peter (1234567)			80.0%							
Dvorak, Ivan (7654321)	54.0%	70.0%	40.0%	70.0%	30.0%	30.0%	30.0%	10.0%	40.0%	70.0%
Ellory, Mary (567894)	85.0%	90.0%	100.0%	90.0%	100.0%	90.0%	90.0%	100.0%	60.0%	100.0%
Finn, John (897654)	53.0%	80.0%	90.0%	90.0%	90.0%	50.0%	80.0%	90.0%	60.0%	80.0%
Total Graded	5	5	6	5	5	5	5	5	5	5
Minimum Grade	35.0%	60.0%	40.0%	70.0%	30.0%	30.0%	30.0%	10.0%	40.0%	30.0%
Maximum Grade	85.0%	90.0%	100.0%	90.0%	100.0%	90.0%	90.0%	100.0%	80.0%	100.0%
Average Grade	61.8%	76.0%	71.6%	84.0%	74.0%	68.0%	68.0%	68.0%	64.0%	66.0%



My Classrooms >> Assessment Results

Organization: Top College
Instructor: ABCD1234 Instructor
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Course: Canadian Investment Funds Course - Academic Partners
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Show Results For: < --- All Students --- >
Exam: Canadian Investment Funds Course - Academic Partners Course Exam

Student	Attempt 1	Attempt 2	Attempt 3	Final Grade	Status
Adams, David	83.0%			83.0%	Passed
Brown, Amanda				0.0%	Active
Chang, Peter	71.0%			71.0%	Passed
Dvorak, Ivan				0.0%	Active
Ellory, Mary				0.0%	Active
Finn, John	60.0%			60.0%	Passed
Gzowski, Paul	85.0%			85.0%	Passed
Huang, Ann	52.0%	59.0%		59.0%	Active
Jones, Bob	76.0%			76.0%	Passed
Kaling, Shiva	77.0%			77.0%	Passed
Neep, Toor	57.0%	62.0%		62.0%	Passed
Patel, Deepak				0.0%	Active
Quan, Min	48.0%			48.0%	Active
Total Graded	9	2	0	13	
Minimum Grade	48.0%	59.0%		0.0%	
Maximum Grade	85.0%	62.0%		85.0%	
Average Grade	67.7%	60.5%		47.8%	

Students rely on IFSE for:

- Innovative courses with interactive design to enhance the learning experience
- Exceptional student support with convenient 24/7 access to courses
- Flexible course format and content to accommodate different learning styles

IFSE maintains an Academic Partner network of more than 30 universities and colleges across Canada

Empowered by IFSE training, 20,000+ students per year open new doors for their careers



COURSE FEATURES



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- Available online (and with printed text available as a complement)
- Easy-to-follow modules using proven adult learning methodologies
- Content is regularly updated by industry professionals – experts in their field
- New courses are developed to meet evolving market and industry needs/interests
- Exercises, case studies and practice exams to reinforce course learning
- Supplementary tools (e.g., in-class sessions, web trainers, study guides) to enhance knowledge retention

COURSE FEATURES IN ACTION

Interactive
Course Content
and exercises

Status Checkbox
tracker for
completed units

Case Study: apply
your knowledge with
a scenario-based
interaction

The screenshot shows the course homepage for 'Canadian Investments Funds Course' by L'Institut IFSE. It includes a 'Welcome' message, a list of 11 units with checkboxes and 'Quiz' links, a 'Case Study' and 'Practice Exam' section, a 'Getting Started Video' player, and a sidebar with 'Resources' (Notes, Glossary, Print) and 'News' alerts.

Unit	Assessment
Unit 1: Regulatory Environment	Quiz
Unit 2: Registrant Responsibilities	Quiz
Unit 3: Suitability	Quiz
Unit 4: Economic Factors and Financial Markets	Quiz
Unit 5: Types of Investments	Quiz
Unit 6: Types of Mutual Funds	Quiz
Unit 7: Portfolio Management	Quiz
Unit 8: Mutual Fund Administration	Quiz
Unit 9: Retirement	Quiz
Unit 10: Taxation	Quiz
Unit 11: Making Recommendations	Quiz

Case Study
Practice Exam

Resources:
Notes
Glossary
Print

News:
CIFC Case Study updated December 19, 2014
Client Relationship Model Phase 2 (for information only)
IFIC CRM2 communications tools (for information only)
CSA discussion of pre-sale delivery of Fund Facts (for information only)
CIFC Glossary available in simplified Chinese

Unit Assessments: Multiple choice
questions to test each unit and
practice exam

Access useful **Resources**

Write **Notes** in popup text editor

Glossary with definitions of each key term

Print PDF of the whole course

Video welcoming
student to the
course

News alerts about
new course
developments,
tools, industry news



CUSTOM OPTIONS



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IFSE develops customized training to fulfill requirements for CE credits or compliance. Custom content is available in three formats:

We can develop new custom content

We can leverage and reconfigure existing content

We can create training material that's a hybrid of standard content and client-specific custom content

YOUR NEXT STEPS

Let us assess your corporate training needs and propose cost-effective solutions that work. Please contact:

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