

# Case Study

## CANADIAN INVESTMENT FUNDS COURSE (CIFIC)



George Donnery is a Senior Customer Service Representative at CIBC. Having been in customer service for several years, first in the U.K. and then in Canada, he decided he was ready to take his career forward and work towards a more financial advisory role.

That's when he turned to IFSE for training and education that could help him reach his career goals. He took the Canadian Investment Funds Course (CIFIC) and found it to be comprehensive, effectively covering all aspects of the Canadian financial environment. George believes the course offered excellent value as his company benefits from partnership pricing with IFSE.

When considering his experience with the CIFIC, George cites the video tutorials (Web Trainer for CIFIC™) as being very helpful. He states that not only were the tutorials informative, but they also presented the information clearly, breaking down the material in an efficient manner and helping him understand the content quickly.

Having successfully completed the CIFIC, he started exploring other positions within his company. He advanced from being a Customer Service Representative to his current senior role. George envisions transitioning into a sales position down the road.

### How has the CIFIC helped George in his day-to-day job?

"In my role I don't advise or discuss investing specifics with clients, but I can provide general information. For instance, I spoke to a client about RRSPs. She's in her 20s and wasn't focused at all on retirement savings, so we discussed the benefits of starting young and building a strong foundation for her future. I also informed her about the LLP and HBP as potential ways to help finance education and home buying, respectively, and how RRSP funds can play a role, if needed. I made the client think about her financial needs for now and in the future, as well as the value of an RRSP."

### Advice from George for other students taking the CIFIC



"I suggest that students take advantage of all the ways that the course facilitates learning (e.g., videos, tutorials, online content) to broaden and deepen their understanding of the course materials."



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