



IFSE

YOUR PARTNER IN FINANCIAL SERVICES EDUCATION



“IFSE provided the perfect platform for my success. The information was presented in easy-to-handle chapters. The follow-up questions and case study solidified the learning. I highly recommend IFSE for corporate and individual use.”

CURTIS HACKNEY, FINANCIAL CONSULTANT, INVESTORS GROUP



Who is IFSE?

IFSE is the educational arm of The Investment Funds Institute of Canada (IFIC) and a leader in online learning delivery. We are dedicated to helping Canadians improve their financial literacy by providing best-in-class financial education and support for individuals, firms and academic institutions.

As a not-for-profit organization, we offer a competitively priced lineup of industry courses. By making our training affordable, we ensure that financial education is widely accessible.

Empowering an Entire Industry

Individual students choose our courses to begin or advance their career in the financial services industry. IFSE also helps advisors enhance their financial expertise with a range of proficiency courses that lead advisors to attain accreditation in targeted areas. We are proud of the role we take in helping advisors build a stronger financial future for their clients.

In addition, we provide guidance to industry professionals, especially as it relates to the complex regulatory landscape, so they can pursue the appropriate registration and receive timely, relevant training. Last but not least, we partner with financial services companies to understand their learning and training needs, creating custom content so their employees gain the critical knowledge and skills required to better serve their clients.

Behind everything IFSE does is the strong belief that building people's knowledge will empower the financial industry as a whole and benefit every investor that the industry serves.

“The IFSE team provide not only excellent comprehensive training courses, they go above and beyond expectations by providing custom sessions to meet our needs. We've appreciated their partnership and willingness to collaborate.”

ANDRE PERSAUD, DIRECTOR, OPERATIONS, SUN LIFE GLOBAL INVESTMENTS

Our Commitment to Superior Service

The needs of our clients continue to change as the financial landscape evolves, so we remain adaptable to meet those changing needs. We deliver a high-touch, personalized customer experience through our dedicated client service representatives. IFSE is committed to accommodating all learning styles by making our courses available in a number of different and engaging formats, often with a high degree of interactive design to enhance the learning experience.

We support our corporate clients by facilitating course implementation and using technological innovation to create customizable back-end solutions for firms looking to outsource their learning management and administration. Whatever the situation, we deliver an effective solution and unparalleled service designed to make the process convenient for our clients, while creating a positive, productive learning experience for every student.

THE INVESTMENT FUNDS INSTITUTE OF CANADA (IFIC)

is IFSE's parent and the voice of Canada's investment funds industry. IFIC brings together 150 organizations, including fund managers, distributors and industry service organizations, to foster a strong, stable investment sector where investors can realize their financial goals. By connecting Canada's savers to Canada's economy, our industry contributes significantly to Canadian economic growth and job creation. IFIC is proud to have served Canada's mutual funds industry and its investors for more than 50 years.



IFSE's Courses at a Glance

We offer many practical courses for those who are in the financial services industry or seeking to work in it. Below are three of our more popular courses. Please visit our website to view descriptions of all courses, including our web-based offerings that can satisfy an advisor's requirement for continuing education (CE) credits.



Canadian Investment Funds Course (CIFIC)

The CIFIC is unlike any course in the industry. The sequence of instruction mirrors the process normally used with clients in the real world. A challenging case study and practice exam enable students to put knowledge into practice. By the end of the course, students will have the fundamentals of what they need to know to be effective mutual fund dealing representatives. The successful completion of the CIFIC Exam meets the proficiency requirement of the provincial securities commissions for mutual fund licensing.



Life License Qualification Program (LLQP)

IFSE is an approved course provider for the Harmonized LLQP. IFSE's study tools are designed to help students succeed on their provincial licensing exams. IFSE will guide students through the regulator's course material, helping them to breakdown complex concepts and providing them with opportunities to test their knowledge. With IFSE's LLQP offering, students develop a solid learning foundation and the skills they need to truly excel on the job as insurance professionals. Delivered online through the IFSE website, the LLQP is accessible, effective and flexible.



Exempt Market Proficiency Course (EMP)

The EMP course introduces students to the world of private placements. The course has been developed to ensure that those individuals operating in the exempt market have the necessary knowledge to advise clients on investment products offered by private placement. Students learn about how the private markets function, the product features of specific exempt products, and the regulatory and suitability obligations that must be observed.

Who Can Benefit from Taking an IFSE Course?

A wide range of individuals — both within and outside of the financial services industry — consider IFSE for their educational needs. Based on real-life client experiences*, here are five common scenarios to consider:



SCENARIO #1 - CELIA CHUNG

Cecilia Chung currently works as a bank teller for a large Canadian bank. Interested in working with clients, Cecilia decides she wants to advance her career by becoming a mutual fund advisor. She discovers that her employer offers training assistance to staff, so she looks for a proficiency course that will give her a deep understanding of mutual funds and the confidence to pursue her goal. Cecilia enrolls in the Canadian Investment Funds Course.



SCENARIO #2 - RAJESH BHUTANI

Rajesh Bhutani is a new immigrant from India. He became interested in investing several years ago when the economies of emerging markets like India began to heat up. He wants to continue investing here and believes mutual funds are a good choice for him at this time. Before he starts investing, Rajesh enrolls in the Canadian Investment Funds Course.



SCENARIO #3 - ENRICO LOPEZ

Enrico Lopez is in charge of the Operations division at a mutual fund company. Some of his staff are located in the Philippines and he wants an easy and cost-effective training solution to help them learn the fundamentals of the Canadian mutual fund industry. Seeking to focus on the operational side of the industry, Enrico enrolls his team in the Canadian Investment Funds Operations Course.



SCENARIO #4 - MONIQUE DESJARDINS

Monique Desjardins is a mutual fund advisor with high-net-worth clients who need better portfolio diversification with lower volatility. She believes that investment strategies such as hedge funds and mortgage investments would benefit her clients, but she must fulfil a proficiency requirement before dealing with such products. Monique enrolls in the Exempt Market Proficiency Course.

*The names and people mentioned in this section are for illustrative purposes only and not intended to represent actual people. Any resemblances to real persons are strictly coincidental.

Corporate Training

If you are a human resources professional involved in organizational learning and development, you know that your company's training needs are diverse, complex and constantly evolving. When you need to train a large group of employees conveniently and cost-effectively, you can turn to IFSE to deliver quality corporate training, be it web-based or through a customized training program that is specifically designed to address your employees' unique needs.

Our corporate training promotes enhanced learning in a classroom setting where employees can openly share ideas and support each other through the study process. Through our Corporate Training Plus™ program, we will tailor your training program to suit your company's unique objectives, incorporating real-world examples of your choosing that will resonate with your employees and make their learning more impactful.



SCENARIO #5 - TAMARA MITCHELL

Tamara Mitchell is the owner of a boutique mutual fund dealer and managing general agency. Her organization has a comprehensive approach



to servicing clients. She encourages her advisors to talk to clients about their insurance and estate planning needs in addition to their investments. When she recruits new advisors, Tamara makes sure they start the licensing process by enrolling them in IFSE's Life License Qualification Program. IFSE also conducts classroom training for her advisors.

How to Register for One of our Courses

Signing up for an IFSE course is easy! Visit the homepage of our website www.ifse.ca to complete our simple registration process.

Also be sure to check out the FAQ on our website, which provides answers to many common questions we receive from students.

Find Out More

If you're looking for a position in financial services, or if you're already in the industry and want to enhance your career potential, consider IFSE's lineup of specialized courses. Our comprehensive, targeted training can provide you with the competitive edge you need to take better control of your career!

Our Customer Service Representatives are available to help you register for courses and examinations, as well as to answer any questions you may have. Please don't hesitate to contact us – we're always happy to help!

“IFSE is in tune with the education and regulatory requirements of the financial industry. Their licensing and continuing education courses evolve to keep up with industry trends, while staying affordable. IFSE has a professional team and provides support in a timely manner.”

MARION ILIOHAN, CFP
ASSISTANT VICE PRESIDENT,
PRACTICE SUPPORT, INVESTORS GROUP

IFSE's courses offer a world of opportunities for your career in financial services. Our list is not exhaustive, but here are the common areas for careers within the industry where you can put your training into action:

- Banking
- Credit unions
- Insurance
- Financial planning
- Mutual funds
- Investment dealers
- Exchange-traded funds
- Pension managers
- Private equity
- Stock exchanges
- Financial media
- Industry regulators



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VOTRE PARTENAIRE DANS
L'ÉDUCATION DES SERVICES FINANCIERS

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