



IFSE Institute

Your partner in training for the financial services industry



Who We Are

IFSE is the educational arm of the Investment Funds Institute of Canada (widely known as IFIC, the voice of Canada's investment funds industry for more than 50 years). We are committed to delivering best-in-class financial education and support for individuals, financial services companies and academic institutions.

IFSE is a proven leader in financial services training, entrusted by regulators to be an approved education provider to the Canadian financial services industry. We are a not-for-profit organization that has been creating affordable, innovative learning solutions since 1967.

What We Offer

IFSE partners with financial services companies across Canada. We work closely with you to truly understand your organization's learning and training needs. Following this discovery phase, we make a recommendation for standard courses or custom content. Either way, IFSE's comprehensive and practical training empowers your employees to be more productive in their roles and give your company a competitive advantage.

We offer a range of training options for financial institutions, including:

- Tailored group training programs and individual self-directed courses
- Proficiency, licensing and continuing education (CE) courses for industry professionals
- Broad-based and niche specialty courses, developed to meet evolving market and industry needs or interests

Our most popular course offerings include the Canadian Investment Funds Course (CIFC), Life License Qualification Program (LLQP) and Exempt Market Proficiency Course (EMP). Ask us or visit ifse.ca to find out more about these three courses or to view our complete course catalogue. Whatever the course, we reinforce our training through various exercises, case studies and practice exams. We also offer supplementary tools such as in-class sessions, web trainers and study guides to help facilitate the learning process.

Customized Learning

If you need us to develop custom training to fulfill requirements for CE credits or compliance, we offer three approaches to customized content. We can:

1. Leverage and reconfigure existing content
2. Develop brand new custom content
3. Create training material that's a hybrid of standard content and client-specific custom content

CORPORATE RATES

For more information on our corporate rates, please contact Fatema Nazarali, Director of Sales and Business Development, at 1.888.865.4342 ext 836.

Leading-edge Adult Learning

When you enrol your employees in IFSE training, they will receive exceptional support and convenient 24/7 access to their courses online. We create an outstanding environment for learning, including innovative courses with interactive design to enhance the educational experience, as well as flexible course formats to accommodate different learning styles. Our subject matter experts are adept at breaking down complex financial concepts into straightforward, readily absorbable content.

The images below illustrate how we have taken adult-learning best practices to the next level.

The screenshots illustrate the IFSE Canadian Investments Funds Course interface. The first screenshot shows a course overview with a table of units and quizzes. The second screenshot shows a 'Case Study' introduction with a video player and navigation buttons. The third screenshot shows a quiz question about regulatory bodies.

Unit	Quiz
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	

Why You Should Consider Partnering With IFSE

- We're an industry leader in innovative online learning delivery
- We offer highly competitive pricing for standard and customized corporate training
- Our superior high-touch, end-to-end customer service support
- We develop your employees' knowledge and skills to benefit your clients and business
- Using our advanced technology learning management system (LMS) solution, we can administer your learning management
- You can easily follow your employees' progress through our real-time reporting platform

Contact Us

Are you interested in helping your employees open new doors to their careers, while better serving your clients and strengthening your business?

Our education experts can assess your corporate training needs and propose cost-effective solutions that work.

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