

| Accreditation Body | CSF- Compliance | CSF- Group Savings Plan Brokerage | CSF - General Subjects | IQPF - SFPA | IQPF - SC | FP Canada - Financial Planning | FP Canada - Product Knowledge | AIC - Life | ICM - Life and/or A&S | ICS - Life and/or A&S | FSCO - Life and/or A&S | Advocis |
|--------------------|-----------------|-----------------------------------|------------------------|-------------|-----------|--------------------------------|-------------------------------|------------|-----------------------|-----------------------|------------------------|---------|
|--------------------|-----------------|-----------------------------------|------------------------|-------------|-----------|--------------------------------|-------------------------------|------------|-----------------------|-----------------------|------------------------|---------|

**INVESTMENT COURSES/ BANKING COURSES**

**ENGLISH**

|   |    |    |    |    |    |     |     |         |     |   |     |      |
|---|----|----|----|----|----|-----|-----|---------|-----|---|-----|------|
| Canadian Investment Funds Course (CIFC)                         | 10 | 40 |    | 40 | 10 | 30* |     | 22.5*** | 5   | 5 | 30* |      |
| 90 Day Training Program for Mutual Fund Dealing Representatives | 10 | 10 |    | 5  | 15 |     |     |         |     |   |     |      |
| Canadian Investment Funds Operations Course (CIFOC)             | 5  | 20 | 5  | 25 | 5  | 30* |     |         | 1.5 | 5 | 30* |      |
| Labour Sponsored Investment Funds Course (LSIF)                 | 5  | 10 |    |    |    |     | 10* |         |     | 5 | 10* |      |
| Officers' Partners' and Directors' Course (OPD)                 | 5  | 10 | 35 | 5  | 25 | 30* |     |         |     | 5 | 30* | 30** |
| Mutual Fund Dealer Compliance Course (MFDC)                     |    |    |    |    |    | 30* |     |         |     | 5 | 30* | 30** |
| Branch Managers' Examination Course (BM)                        | 10 | 10 | 30 | 5  | 25 | 30* |     |         |     | 5 | 30* | 30** |
| Ethics and Professional Conduct Course (EPC)                    | 30 |    |    |    | 5  | 30* |     |         |     | 5 | 30* | 30** |

**FRENCH**

|   |    |    |    |    |    |     |  |         |   |   |     |      |
|---|----|----|----|----|----|-----|--|---------|---|---|-----|------|
| Cours sur les fonds d'investissement au Canada (CFIC) | 10 | 40 |    | 40 | 10 | 30* |  | 22.5*** | 5 | 5 | 30* |      |
| Cours à l'intention des directeurs de succursale (DS) | 10 | 10 | 30 |    | 10 | 30* |  |         |   | 5 | 30* | 30** |
| Cours d'éthique professionnelle (CEP)                 | 30 |    |    |    | 30 |     |  |         |   |   |     |      |

**EXEMPT MARKET COURSES**

**ENGLISH**

|  |    |    |  |    |   |     |  |  |  |   |     |  |
|--|----|----|--|----|---|-----|--|--|--|---|-----|--|
| Exempt Market Proficiency Course (EMP)                           | 15 | 15 |  | 15 |   | 30* |  |  |  | 5 | 30* |  |
| Ethics for Exempt Market Dealer Representatives                  | 8  |    |  |    | 8 | 8*  |  |  |  |   |     |  |
| Accredited Investor and Offering Memorandum Exemption Case Study |    | 3  |  |    | 3 |     |  |  |  |   |     |  |

**FRENCH**

|  |    |    |  |    |  |     |  |  |  |   |     |  |
|--|----|----|--|----|--|-----|--|--|--|---|-----|--|
| Cours de compétence sur le marché dispensé | 15 | 15 |  | 15 |  | 30* |  |  |  | 5 | 30* |  |
|--|----|----|--|----|--|-----|--|--|--|---|-----|--|

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 \*\*\* Valid for courses completed up to Oct 01,2019.  
 Note: Courses that lead to initial accreditation generally cannot be used for continuing education purposes for the achieved license or designation.

| Accreditation Body   | CSF- Compliance | CSF - Insurance of Persons | CSF - Group Insurance of Persons | IQPF - SPPA | IQPF - SC | FP Canada - Financial Planning | AIC - Life | AIC - A&S | ICM - Life and/or A&S | ICS - Life and/or A&S | ICBC - Life and/or A&S |
|--|-----------------|----------------------------|----------------------------------|-------------|-----------|--------------------------------|------------|-----------|-----------------------|-----------------------|------------------------|
| <b>INSURANCE COURSES</b>   |                 |                            |                                  |             |           |                                |            |           |                       |                       |                        |
| <b>ENGLISH</b>   |                 |                            |                                  |             |           |                                |            |           |                       |                       |                        |
| Life License Qualification Program(LLQP) (Canada)  | 10              | 10                         | 10                               | 20          | 10        | 30*                            | 30         | 30        | 30                    | 30**                  | 30*                    |
| Life License Qualification Program (LLQP) (Civil Code)   | 10              | 10                         | 10                               | 20          | 10        | 30*                            | 30         | 30        | 30                    | 30**                  | 30*                    |
| Life License Qualification Program (LLQP) (Common Law)   | 10              | 10                         | 10                               | 20          | 10        | 30*                            | 30         | 30        | 30                    | 30**                  | 30*                    |
| Accident and Sickness Course (A&S) (Canada)  | 10              | 5                          |                                  | 5           | 15        | 15*                            | 15         | 15        | 15                    | 15                    | 15*                    |
| Accident and Sickness Course (A&S) (Civil Code)  | 10              | 5                          |                                  | 5           | 15        | 15*                            | 15         | 15        | 15                    | 15                    | 15*                    |
| Accident and Sickness Course (A&S) (Common Code)   | 10              | 5                          |                                  | 5           | 15        | 15*                            | 15         | 15        | 15                    | 15                    | 15*                    |
| <b>FRENCH</b>  |                 |                            |                                  |             |           |                                |            |           |                       |                       |                        |
| Programme de qualification en assurance de personnes (PQAP) (Canada)   | 10              | 10                         | 10                               | 20          | 10        | 30*                            | 30         | 30        | 30                    | 30**                  | 30*                    |
| Programme de qualification en assurance de personnes (PQAP) (Code Civil)   | 10              | 10                         | 10                               | 20          | 10        | 30*                            | 30         | 30        | 30                    | 30**                  | 30*                    |
| Programme de qualification en assurance de personnes (PQAP) (Common Code)  | 10              | 10                         | 10                               | 20          | 10        | 30*                            | 30         | 30        | 30                    | 30**                  | 30*                    |
| Cours sur l'assurance contre la maladie ou les accidents (Canada)  | 10              | 5                          |                                  | 5           | 15        | 15*                            | 15         | 15        | 15                    | 15                    | 15*                    |
| Cours sur l'assurance contre la maladie ou les accidents (Code Civil)  | 10              | 5                          |                                  | 5           | 15        | 15*                            | 15         | 15        | 15                    | 15                    | 15*                    |
| Cours sur l'assurance contre la maladie ou les accidents (Common Code)   | 10              | 5                          |                                  | 5           | 15        | 15*                            | 15         | 15        | 15                    | 15                    | 15*                    |
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|--------------------|-----------------|----------------------------------|-----------------------|---------------------------|-----------|----------|---------------------------------|--------------------------------|-----------|----------|----------------------|----------------------|-----------------------|-----------------------|
|--------------------|-----------------|----------------------------------|-----------------------|---------------------------|-----------|----------|---------------------------------|--------------------------------|-----------|----------|----------------------|----------------------|-----------------------|-----------------------|

**CONTINUING EDUCATION**

**ENGLISH**

|  |   |    |   |   |    |   |    |     |     |   |   |   |    |    |
|--|---|----|---|---|----|---|----|-----|-----|---|---|---|----|----|
| Exchange-traded Funds Course                         |   | 15 |   |   | 15 |   | 15 | 15* |     |   |   | 5 |    | 8* |
| Segregated Funds                                     |   |    |   | 8 | 8  |   |    | 8*  | 8** |   | 5 | 8 | 8* | 8* |
| Client Relationship Model Phase 2                    | 1 |    |   |   |    | 1 |    | 1   |     |   |   |   |    |    |
| Tax Efficient Investing                              |   | 8  | 7 |   | 15 |   |    | 8*  |     |   |   | 5 |    | 5* |
| Leveraging for Investments                           |   | 3  | 2 |   | 5  |   |    | 5*  | 5** |   | 5 | 5 | 5* | 5* |
| Ethics and Professional Practice (Civil Code)        | 5 |    |   |   |    | 5 |    | 5*  | 5   | 5 | 5 | 5 | 5* | 5* |
| Ethics and Professional Practice (Common Code)       | 5 |    |   |   |    | 5 |    | 5*  | 5   | 5 | 5 | 5 | 5* | 5* |
| Ethics and Standard of Conduct                       | 2 |    |   |   |    | 2 |    | 2*  |     |   |   |   |    |    |
| Navigating the Regulatory Environment                | 3 |    |   |   |    | 3 |    | 3*  |     |   |   |   |    |    |
| Getting Qualified and Registered                     | 1 |    |   |   |    | 1 |    | 1*  |     |   |   |   |    |    |
| Dealing with New Clients and Seniors                 | 2 |    |   |   |    | 2 |    | 2*  |     |   |   |   |    |    |
| Understanding Your Business Conduct Responsibilities | 2 |    |   |   |    | 2 |    | 2*  |     |   |   |   |    |    |
| Knowing Your Suitability Obligations                 | 3 |    |   |   |    | 4 |    | 4*  |     |   |   |   |    |    |
| Avoiding Prohibited Practices                        | 1 |    |   |   |    | 2 |    | 2*  |     |   |   |   |    |    |
| Leverage Suitability                                 | 3 |    |   |   |    | 4 |    | 4*  |     |   |   |   |    |    |
| Conflicts of Interest                                | 3 |    |   |   |    | 4 |    | 4*  |     |   |   |   |    |    |

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|--------------------|-----------------|----------------------------------|-----------------------|---------------------------|-----------|----------|---------------------------------|--------------------------------|-----------|----------|----------------------|----------------------|-----------------------|-----------------------|
|--------------------|-----------------|----------------------------------|-----------------------|---------------------------|-----------|----------|---------------------------------|--------------------------------|-----------|----------|----------------------|----------------------|-----------------------|-----------------------|

**CONTINUING EDUCATION**

**FRENCH**

|   |   |    |  |  |    |   |    |     |   |   |   |   |    |    |
|---|---|----|--|--|----|---|----|-----|---|---|---|---|----|----|
| Cours sur les fonds négociés en bourse                |   | 15 |  |  | 15 |   | 15 | 15* |   |   |   | 5 |    | 8* |
| Modèle de relation client conseiller Phase 2          | 1 |    |  |  |    | 1 |    | 1   |   |   |   |   |    |    |
| Déontologie et pratique professionnelle (Code Civil)  | 5 |    |  |  |    | 5 |    | 5*  | 5 | 5 | 5 | 5 | 5* | 5* |
| Déontologie et pratique professionnelle (Common Code) | 5 |    |  |  |    | 5 |    | 5*  | 5 | 5 | 5 | 5 | 5* | 5* |
| Éthique et norme de conduite                          | 2 |    |  |  |    | 2 |    | 2*  |   |   |   |   |    |    |
| Naviguer l'environnement réglementaire                | 3 |    |  |  |    | 3 |    | 3*  |   |   |   |   |    |    |
| Obtenir votre qualification et inscription            | 1 |    |  |  |    | 1 |    | 1*  |   |   |   |   |    |    |
| Traiter avec des personnes âgées                      | 2 |    |  |  |    | 2 |    | 2*  |   |   |   |   |    |    |
| Comprendre vos responsabilités de code de conduite    | 2 |    |  |  |    | 2 |    | 2*  |   |   |   |   |    |    |
| Connaître vos obligations en matière de convenance    | 3 |    |  |  |    | 4 |    | 4*  |   |   |   |   |    |    |
| Éviter les pratiques interdites                       | 1 |    |  |  |    | 2 |    | 2*  |   |   |   |   |    |    |
| Convenance du levier financier                        | 3 |    |  |  |    | 4 |    | 4*  |   |   |   |   |    |    |
| Conflits d'intérêts                                   | 3 |    |  |  |    | 4 |    | 4*  |   |   |   |   |    |    |

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