



January 2015

1. Individual Exemptions and Equivalencies

- An exemption request form must be completed by the individual for each exemption requested
- Course content and evaluation details are to be provided for assessment purposes (e.g. tables or content or course syllabus)
- An original Course Transcript indicating successful completion of the course within the last 10 years must be submitted
- More than one Third party course may be assessed in order to achieve a course exemption. For example, an individual who has taken an economics course and a communications course at a university may ask that both courses be applied for an exemption against one CSI course that covers both of these topics. In such a case, a course syllabus and tables of contents for the study materials from both courses are required for assessment purposes. Alternatively, if one course is submitted as being worth two exemptions, the individual will submit the administrative fee of \$100 and \$200 for the exemptions granted (\$100 for each exemption)
- Note: The Canadian Investment Fund Course offered through IFIC has a course exemption for Investment Funds In Canada due to regulatory licensing requirements and does not require submission of a course syllabus, but does require the administrative fee of \$100 and the \$100 exemption fee (\$200 total).

2. Standing Exemptions for Third Party Course Providers

- Standing course exemptions may be sought by Third Party providers of education. Third Party providers of education or training programs must meet CSI academic and evaluation standards
- Exemptions are granted for a 3 year period
- Individual courses can be assessed at a fee of \$750
- Where a standing exemption has been approved, the \$100 administrative fee will be waived and individuals will be required to submit only the \$100 per exemption.
- For example, a college or university or professional educational organization may choose to submit a course for a standing exemption. If this standing exemption has been applied for (by the organization), and granted by CSI, then the individual person who is seeking an exemption within the PFP educational program, will not be required to submit an administrative fee (as it has already been paid by the organization). At this time only Seneca College has an agreement in place for PFSA until February 9, 2015.