



THE FELLOW OF CSI® *The Pinnacle Financial Services Credential*

Every Industry Needs Distinguished Leaders...

Known as the Pinnacle, the Fellow of CSI (FCSI) is the highest and most coveted achievement in financial services. FCSIs represent an elite group of professionals who are charged with leading the industry.

FCSIs are recognized as the finest and most dedicated in financial services because the Fellow is one of the most demanding credentials to obtain and maintain. FCSIs have years of experience and deep, broad industry knowledge. They are dedicated to the betterment of the industry and set the highest standards for ethics, leadership and trust.

MORE THAN 3 DECADES OF EXCELLENCE

More than 3,500 FCSIs have been leading, changing and inspiring the financial services industry for the past 35 years.

Fellow of CSI® Membership Benefits

FCSIs are members of an elite group of financial services professionals who are recognized and respected by clients, employers and industry peers. Additionally, FCSIs enjoy the following exclusive benefits:

- **Personalized listing on FCSI's online directory** to increase profile among clients and employers.
- **Access to FCSI logos** for use on business cards, letterhead and marketing materials.
- **Insights from the FCSI Advisory Council**, which comprises industry leaders with cutting-edge perspectives.
- **Subscription to the FCSI LinkedIn group** to network with like-minded distinguished leaders.
- **Marketing resources** including CSI-provided templates.
- **National promotion** to increase awareness of the value of the Fellow.
- **Opportunities to elevate profile** as financial services experts in the CSI community.
- **Front-of-the-Line VIP Customer Service** from CSI.



The Path to Excellence – Fellow of CSI® Requirements

DESIGNATION	<p><i>Candidates must already have at least 1 of the following designations:</i></p> <ul style="list-style-type: none"> • Personal Financial Planner (PFP®) • Chartered Strategic Wealth Professional (CSWP®) • Chartered Investment Manager (CIM®) • MTI Estate and Trust Professional (MTI®) • Derivatives Market Specialist (DMS®) • Financial Management Advisor (FMA®) • Fellow, Institute of Canadian Bankers (FICB®) • Certified Financial Planner (CFP®) • Chartered Financial Analyst (CFA®) • Chartered Life Underwriter (CLU®)
EDUCATION	<p><i>Candidates must also complete:</i></p> <ul style="list-style-type: none"> • 2 courses on subject matter outside of their designation field of expertise • The Financial Services Industry: Business Drivers and Challenges (FSDC) course
EXPERIENCE	<p><i>Candidates must have extensive, current experience:</i></p> <ul style="list-style-type: none"> • At least 7 years of financial services industry experience within the past 10 years
ENDORSEMENT	<p><i>Candidates must provide endorsements from:</i></p> <ul style="list-style-type: none"> • Either a direct supervisor OR a sponsor who is a practicing FCSI®
MAINTAINING THE FELLOW	<p><i>FCSIs are required to, on an annual basis:</i></p> <ul style="list-style-type: none"> • Subscribe to the FCSI Code of Ethics and set the standard of ethical conduct in their field • Be active contributors to the industry • Pay a membership fee of \$275* <p><small>*Fee may be lower based on number of CSI designations in good standing.</small></p>

ELEVATING AN INDUSTRY THROUGH ONGOING CONTRIBUTION

In order to maintain their Fellow, FCSIs must exemplify leadership through active industry contribution.

Activities include:

- Speaking engagements
- Academic contributions
- Writing contributions
- Mentoring

Talk to us about how you can build distinguished financial services leaders within your organization.

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