



Canadian Securities Institute

Moody's Analytics Training & Certification Services

CSI Corporate Profile

The Canadian Securities Institute (CSI) has been Canada's leading provider of professional credentials and compliance solutions for the financial services industry, helping more than 750,000 financial professionals reach their career goals. CSI offers more than 270 courses ranging from the well-known [Canadian Securities Course \(CSC\)[®]](#) to sophisticated accreditation designation programs such as the Chartered Strategic Wealth Professional ([CSWP[®]](#)) designation. Valued for its leadership in Canada, CSI also partners with organizations world-wide to provide financial services proficiency training in Asia, Europe, the Middle East, Central America and the Caribbean. CSI can be found at www.csi.ca.

About CSI

CSI sets the standard for financial services education in Canada as the most experienced and trusted educator endorsed by regulatory authorities across Canada. Since it was established in 1970 as the Canadian Securities Institute, over three quarters of a million financial professionals have chosen CSI for their career training and development.

In 2007 CSI expanded its educational services with the acquisition of the Institute of Canadian Bankers (ICB). Today, CSI offers one of the most comprehensive suites of courses and programs available to financial services professionals in Canada and around the world.

CSI has earned its reputation through relevant, real-world training courses and assessments, innovative educational offerings and expertise ranging from securities to mutual funds, from banking and trust to insurance, from portfolio management to financial planning and wealth management.

[CSI designations & certificates](#) represent prestigious credentials that allow financial advisors to prosper. They stand for dedication, professional standards, career focus, and leadership. CSI has established professional credentials in specialties like financial derivatives and wealth management, adding to its respected and established courses and seminars. As a true measure of expertise, CSI designations are the recognized benchmark for regulatory authorities, financial organizations and associations in Canada and around the globe. We are a trusted partner to regulators and financial institutions helping to raise the competency of professionals.

As a certifying body for the [PFP[®] designation](#), CSI ensures PFP professionals and candidates meet the highest standards of competence and professionalism. CSI is accredited by the [American National Standards Institute](#) to ISO 17024 which acknowledges meeting recognized global standards for certification bodies.

A thought leader and pre-eminent partner to regulators and financial institutions, CSI has evolved from a specialized provider of securities training into a world-class financial services education company. We collaborate with our stakeholders and customers to interpret, guide, preserve and raise the level of proficiency in the industry. We maintain the highest educational and ethical standards by developing relevant and timely course content, based on continuous involvement with the investment and banking community, markets and regulators.

CSI is internationally valued for its proven expertise. CSI has earned a strong international reputation in financial services education, offering more than 270 courses and continuing education programs of world-class standard. CSI is expanding into new markets by developing educational content for securities industries in emerging international financial markets such as China and the Middle East.

An innovative, lifelong career partner, CSI provides a broad range of applied learning to professionals through a variety of delivery channels from distance to on-line to classroom formats. CSI is committed to making its programs and accreditations accessible anytime, anywhere to meet the needs of its diverse customer base. CSI operates as part of the Training and Certification arm of [Moody's Analytics](#). CSI is endorsed by the [Investment Industry Regulatory Organization of Canada \(IIROC\)](#), Canada's stock exchanges and Canada's securities regulatory commissions. Visit www.csi.ca for more information.