



Milestones

- 2010** CSI is acquired and becomes an indirect subsidiary of Moody's Corporation operating as a separate company within Moody's Analytics. Leveraging Moody's Analytics significant global assets and capabilities ensures that CSI continues to be the world-wide leader in financial education and accreditation and remains a partner of choice with regulators, financial services companies and professionals.
- 2007** CSI acquires the Institute of Canadian Bankers (ICB), a leader in the field of innovative financial services training and education. By expanding its expertise into the banking sector CSI now offers advanced educational courses in licensing and compliance training in banking, investment, wealth management, insurance, trust and management studies.
- 2007** CSI launches the Chartered Strategic Wealth Professional (CSWP) designation program targeted at wealth managers who are specializing in serving high net worth clients.
- 2005** CSI launches the Canada-China initiatives. Top financial services professionals from China are offered intensive programs in Toronto with subjects ranging from basic financial markets and investment options to advanced cases in investment banking operations, risk management and wealth management. This ongoing partnership, developed with the Securities Association of China (SAC), is part of a growing list of training programs CSI is offering in China, and other international markets.
- 2003** The non-profit Canadian Securities Institute was transformed into CSI Global Education Inc., a for-profit corporation to allow CSI to capitalize on its unique systems and technologies, develop new products and expand services to other markets.
- 2001** CSI is one of only ten educational providers nationally to earn accreditation to provide training that leads to life insurance licensing. The Canadian Insurance Course is subsequently introduced.
- 2000** A new, specialized designation is launched to certify professionals in the rapidly growing financial derivatives market. CSI's Derivatives Market Specialist the first of its kind to be offered internationally.
- 1999** The first extensive launch of online enrollment and other interactive learning tools is introduced on the csi.ca website. It's the first step to roll out a full roster of Internet-based courses.
- 1994** CSI launches the development of new designations in financial planning and portfolio management. Educational services are formally expanded beyond the securities industry, to serve the training needs of banks, mutual fund dealers and universities.