

# News

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## Canadian Securities Institute Launches New Alternative Strategies Course

**TORONTO, January 29, 2019** – The Canadian Securities Institute (CSI), a Moody's Analytics company, is pleased to announce a new course, Alternative Strategies: Hedge Funds and Liquid Alts. The course prepares Canada's investment advisors to advise on and sell Alternative Mutual Funds, otherwise known as Liquid Alts.

With recent Canadian Securities Administrators' (CSA) amendments to investment fund regulation (National Instrument 81-102), Canada's retail investors can now invest in Alternative Mutual Funds through their investment advisor. These funds offer investors the ability to diversify their portfolios with exposure to alternative strategies such as physical commodities, short-selling, and using derivatives and leverage. Prior to this regulatory change, alternative investment strategies were available primarily through hedge funds that are accessible only to a limited audience.

"Alternative Mutual Funds can play an important role in diversifying the portfolios of Canada's retail investors" said Marshall Beyer, Senior Director of Credentialing and Licensing Strategy at CSI. "But these products are complex and carry risks that must be carefully considered by both investors and their investment advisors."

CSI's online course is designed to equip financial advisors with an understanding of the features, benefits, and risks of alternative strategies. It explains how such strategies can fit into a client portfolio, and covers due diligence steps for evaluating alternative funds, determining suitability, and establishing performance measurement and benchmarks.

The course has been designed to meet "Know Your Product" responsibilities of licensed Investment Advisors and Representatives who are planning to assist retail clients who seek to invest in Alternative Mutual Funds. It has been accredited for multi-jurisdictional continuing education credits.

[Click here](#) to learn more about CSI's new Alternative Strategies: Hedge Funds and Liquid Alts course.

**About CSI**

The Canadian Securities Institute (CSI), is Canada's leading provider of financial services education and credentials. CSI offers more than 170 courses, such as the well-known Canadian Securities Course (CSC®), twelve certificate programs, popular specialized financial designations, such as PFP®, CIM®, CIWM, MTI®, and the Fellow of CSI (FCSI®). CSI is the primary provider of regulatory courses and examinations for the Investment Industry Regulatory Organization of Canada's (IIROC) and is accredited by several Canadian securities and insurance regulators. CSI operates as a Moody's Analytics company. For more information, please visit [www.csi.ca](http://www.csi.ca).

### **About Moody's Analytics**

Moody's Analytics provides financial intelligence and analytical tools to help business leaders make better, faster decisions. Our deep risk expertise, expansive information resources, and innovative application of technology help our clients confidently navigate an evolving marketplace. We are known for our industry-leading and award-winning solutions, made up of research, data, software, and professional services, assembled to deliver a seamless customer experience. We create confidence in thousands of organizations worldwide, with our commitment to excellence, open mindset approach, and focus on meeting customer needs. For more information about Moody's Analytics, visit [www.moodyanalytics.com](http://www.moodyanalytics.com).

Moody's Analytics is a subsidiary of Moody's Corporation (NYSE: MCO). Moody's Corporation reported revenue of \$4.2 billion in 2017, employs approximately 12,600 people worldwide and maintains a presence in 42 countries.

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