



eLEARNING

# Investment Funds in Canada (IFC)

HELP YOUR CLIENTS MAKE SMART INVESTMENT DECISIONS



DURATION

90 - 140 hours



DELIVERY CHANNEL

eLearning



## Course Topics:

- 1 Introduction to the Mutual Funds Marketplace
- 2 The Know Your Client Communication Process
- 3 Understanding Investment Products and Portfolios
- 4 Understanding Mutual Funds and Managed Products
- 5 Evaluating Mutual Funds
- 6 Ethics, Compliance and Mutual Fund Regulations

## COURSE OVERVIEW & BENEFITS

The IFC provides foundational knowledge that prepares Advisors to give clients effective advice on mutual fund investments based on a client's objectives, timeline and risk tolerance. It also provides greater insight into a mutual fund representative's legal, ethical and professional responsibilities.

- Completing the course will help push your resume to the top and gain a competitive advantage while applying for jobs.
- You will also qualify to apply to become an MFDA member and perform mutual fund transactions and provide clients with effective financial advice.
- Completing the IFC will open doors to earn more financial credentials and designations.

## COMPETENCIES GAINED

- Understand the Canadian financial markets and the mutual funds industry better.
- Analyze the risk-return relationship of investments.
- Gain more in-depth insight into assessing mutual fund performance and fee structure.
- Build skills to create and effectively manage client portfolios.

## LEARNING OBJECTIVE

By completing this course, learners will have an in-depth understanding of the Canadian financial services landscape. They will gain the knowledge needed to make smart investment decisions, become a confident advisor and build a solid foundation for their career. This course will enable you to meet your MFDA regulatory requirements to register for a license to sell mutual funds in Canada.

## INTENDED AUDIENCE

### Enrol in the CSC if you're:

- Seeking your license to sell mutual funds
- A financial services professional seeking to grow your knowledge-base
- Want a broader understanding of capital markets

For more information contact: [designations@csi.ca](mailto:designations@csi.ca)

# Course Detail

TOPICS	CHAPTERS
1 <b>Introduction to the Mutual Funds Marketplace</b>	1 The Role of the Mutual Fund Sales Representative
	2 Overview of the Canadian Financial Marketplace
	3 Economic Principles
2 <b>The Know Your Client Communication Process</b>	4 Getting to Know the Client
	5 Behavioural Finance
	6 Tax and Retirement Planning
3 <b>Understanding Investment Products and Portfolios</b>	7 Types of Investment Products and How They Are Traded
	8 Constructing Investment Portfolios
	9 Understanding Financial Statements
4 <b>Understanding Mutual Funds and Managed Products</b>	10 The Modern Mutual Fund
	11 Conservative Mutual Fund Products
	12 Riskier Mutual Fund Products
	13 Alternative Managed Products
5 <b>Evaluating Mutual Funds</b>	14 Understanding Mutual Fund Performance
	15 Selecting A Mutual Fund
	16 Mutual Fund Fees and Services
6 <b>Ethics, Compliance and Mutual Fund Regulations</b>	17 Mutual Fund Dealer Regulation
	18 Applying Ethical Standards to What You Have Learned