

A woman with dark curly hair, wearing a blue patterned top, is smiling and looking at a laptop. She is in a kitchen with a brick wall and various kitchen items in the background. A semi-transparent white banner is overlaid across the middle of the image.

What's Next? Your Future in Financial Services



Canadian Securities Institute
A Moody's Analytics Company

JANUARY 31, 2023

Meet The Presenters



RUI BARRETO

Host

Director

CSI & Moody's
Analytics



MARIE MULDOWNEY

Presenter

Managing Director

CSI



ASSUNTA TUTINO

Presenter

Assistant Director
Client Management

CSI & Moody's
Analytics



TIMOTHY HO

Presenter

Director
Practice Standards,
National Sales &
Practice Excellence

CIBC



IDREES DEEN

Presenter

Head of Marketing

CSI & Moody's
Analytics



TRICIA SUMMERSBY

Presenter

Vice-President &
Managing Director
Branch Supervision

BMO Nesbitt Burns

Agenda

- Introductions
- Insights for Students Entering the Financial Services Industry
 - Marie Muldowney
- Personal Journey & Advice to Students
 - Timothy Ho
 - Idrees Deen
 - Tricia Summersby
- CSI Credentials
 - Marie Muldowney
- How to get started
 - Assunta Tutino
- Q&A



In your experience, what is important for students to keep in mind when pursuing a career in the financial services industry, and do you have some insights on why students want to enter the field?

The importance of technical skills & soft skills

- Soft skills are just as valuable as technical skills.
- Recruiters are looking for professionals who are client and people focused.
- In order to build a loyal customer base, you need to provide solid advice and communicate well.

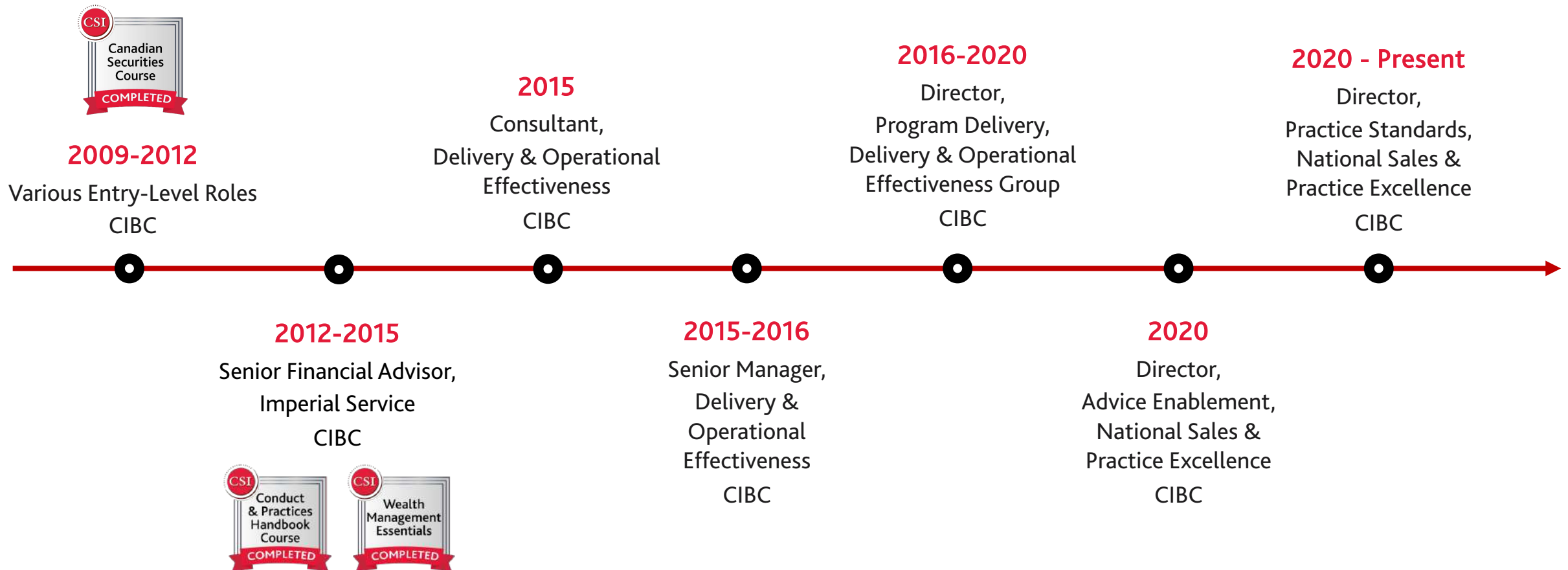
Soft skills:

- Informing and educating clients
- Negotiating contracts
- Working with families and teams

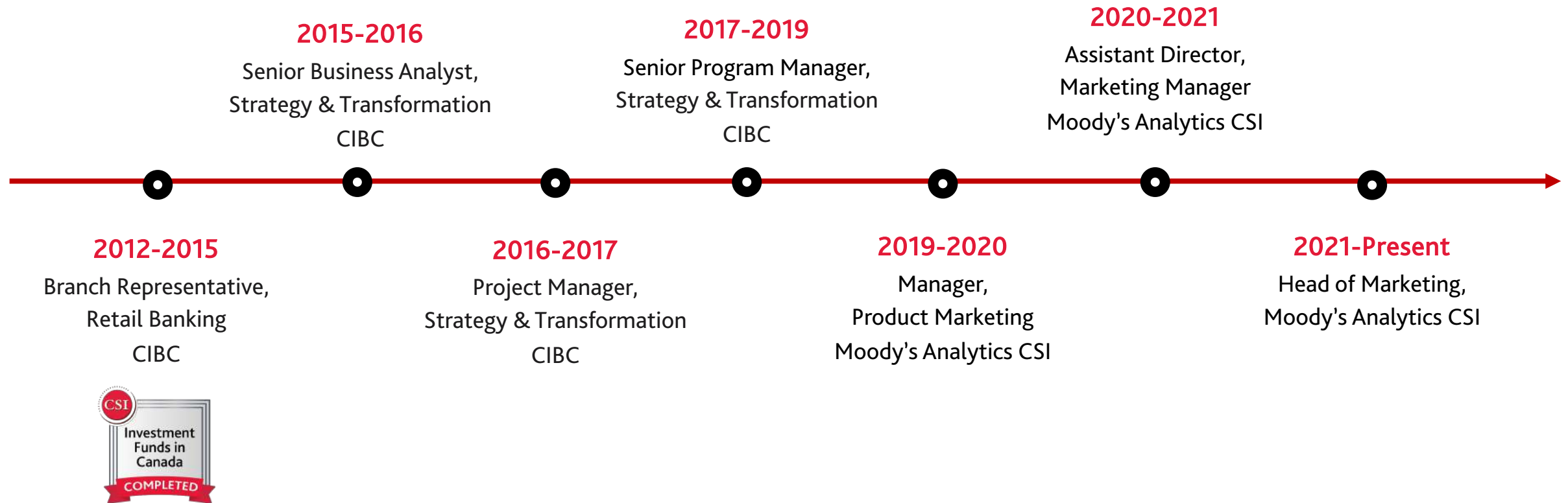


Please tell us about your career journey.

Success Stories – Timothy Ho



Success Stories – Idrees Deen





Which credentials and skill sets do students need to get started, and what industry segments are open to them?

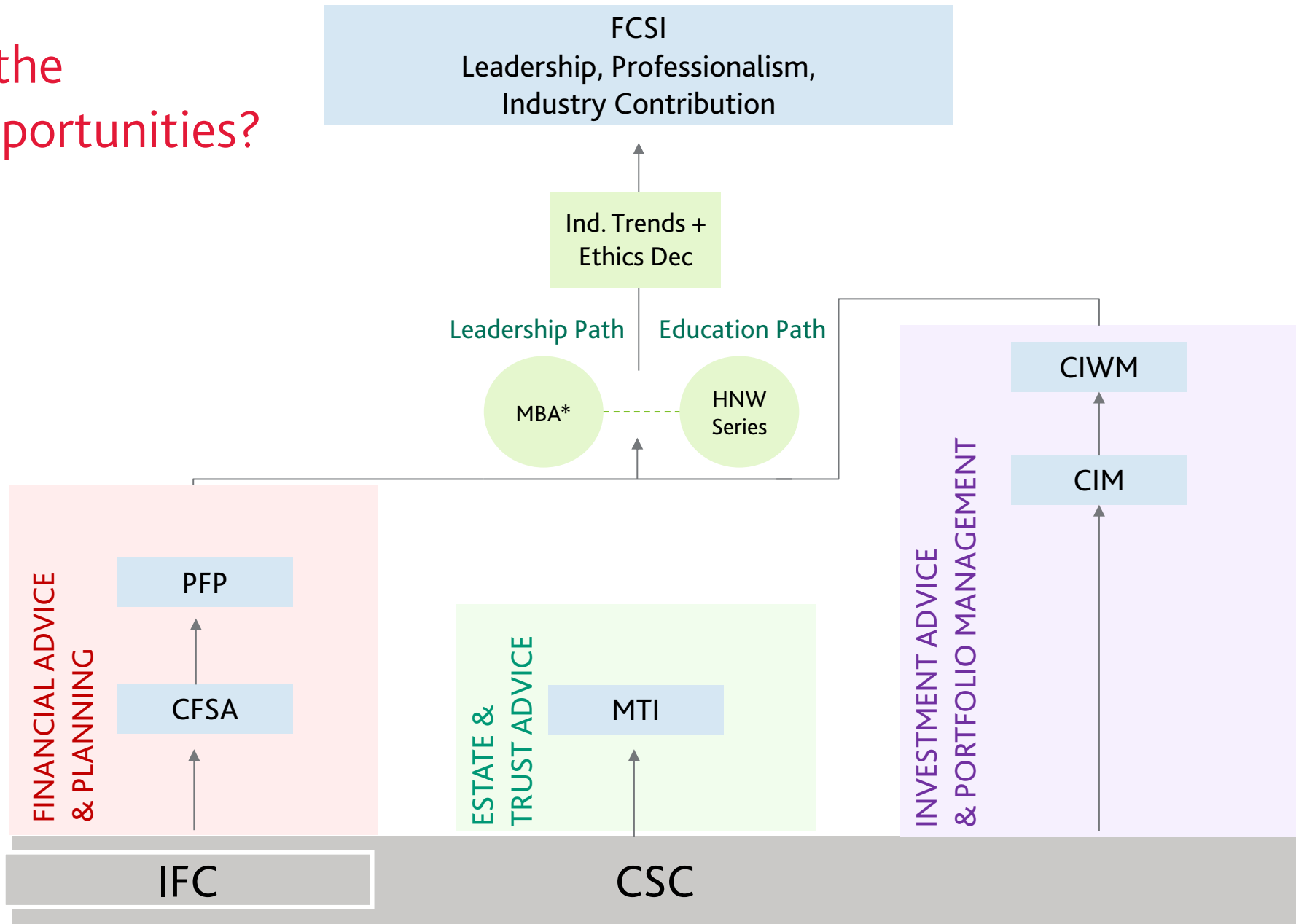
How to get started

To kick-start a promising career in Canada's financial services industry, CSI offers the Canadian Securities Course (CSC®).

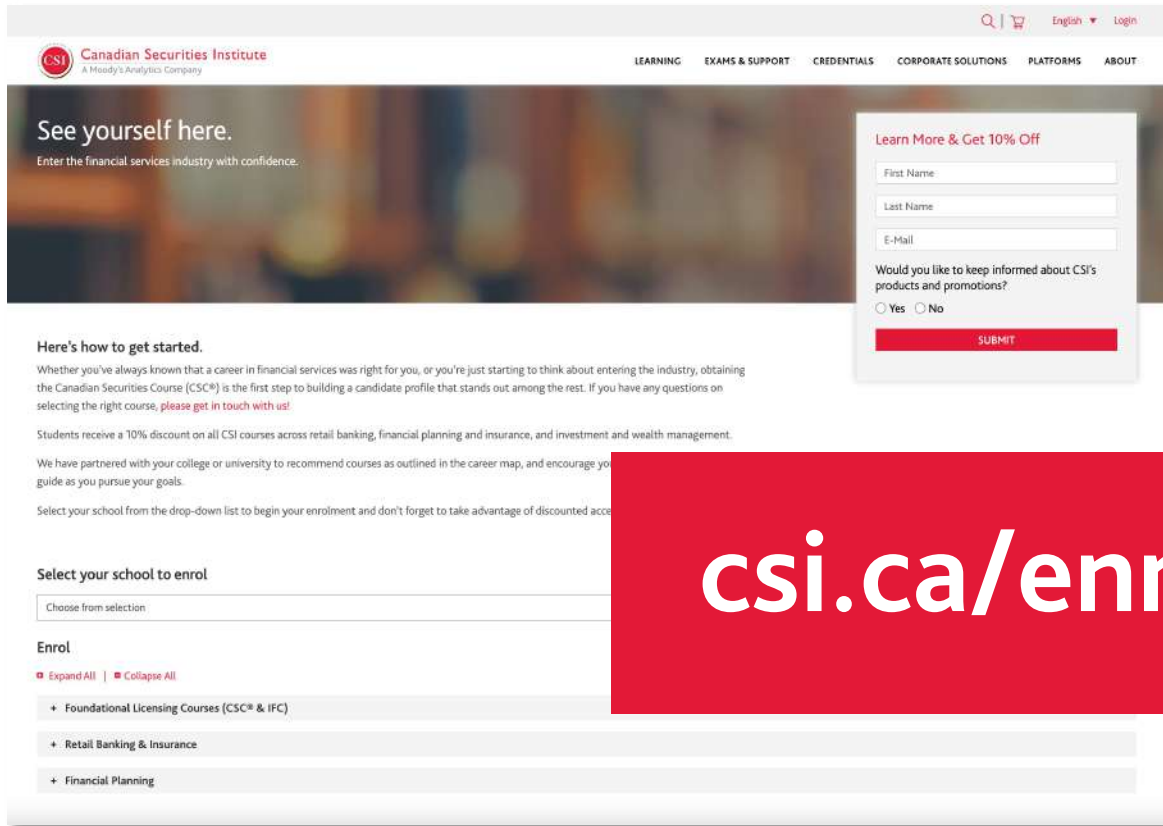
Obtaining the CSC® is the first step to building a candidate profile that stands out among the rest, so that you can build the future you've always imagined.



What are the Career Opportunities?



Visit our website to get started



The screenshot shows the Canadian Securities Institute (CSI) website. The header includes the CSI logo, the text "Canadian Securities Institute A Moody's Analytics Company", and navigation links: LEARNING, EXAMS & SUPPORT, CREDENTIALS, CORPORATE SOLUTIONS, PLATFORMS, and ABOUT. A search icon, language selector (English), and login link are in the top right.

The main banner features the text "See yourself here. Enter the financial services industry with confidence." Below this, a section titled "Here's how to get started." provides information about the Canadian Securities Course (CSC®) and a 10% discount for students. A "Select your school to enrol" section includes a dropdown menu and an "Enrol" button.

A "Learn More & Get 10% Off" form is overlaid on the right side of the banner. It contains fields for First Name, Last Name, and E-Mail, followed by a checkbox for "Would you like to keep informed about CSI's products and promotions?" with "Yes" and "No" radio buttons. A red "SUBMIT" button is at the bottom.

A large red banner with the text "csi.ca/enrol" is positioned over the bottom right of the website screenshot.

The Canadian Securities Institute partners directly with colleges and universities to incorporate our curriculum and offers preferred pricing to help students to get started.

Q&A and Contact Details

To begin learning, visit csi.ca/enrol



OVER
50
YEARS OF TRAINING
EXPERIENCE



OVER
750,000
ALUMNI



OVER
135
E-LEARNING
COURSES



OVER
16,000
CREDENTIALLED
DESIGNATION HOLDERS



OVER
250
INSTITUTIONAL
CLIENTS

Questions? Email designations@csi.ca

Thank you