Online CE Catalog

BCC ONLINE SUBSCRIPTION

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Contents

Ethics

These courses is approved for Ethics and Professional Responsibility credits for several different jurisdiction and licenses.

Addressing Conflicts of Interest

1 hour

This course looks at conflicts of interest; how to spot them and how to address them. The course covers creating effective policies for maintaining compliance responsibilities with respect to conflicts of interest.

British Columbia	1 Life and 1 General Credit
Alberta	1 Life, 1 A&S, 1 General Credit
Saskatchewan	1 Life, 1 Approved Ethics Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Credit for Professional Responsibility
Advocis	1 Ethics Credit
IIROC	1 Credit for Cycle 8 Compliance

Ethics Case Studies, Volume I

1 hour

This course is approved for Ethics and Professional Responsibility credits for several different jurisdiction and licenses.

In this course, you will cover:

- A case study dealing with an inadvertent disclosure of client information
- A case study dealing with an inappropriate use of a Power of Attorney.

For both cases, discussion will cover:

- The advisor's role and responsibilities.
- Possible handling of ethical and regulatory dilemmas.
- Steps to prevent problems before they arise.

British Columbia	1 Life and 1 General Credit
Alberta	1 Life and 1 A&S Credit
Saskatchewan	1 Life, 1 Approved Ethics Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Professional Responsibility Credit
Advocis	1 Professional Responsibility Credit
IIROC	1 Credit for Cycle 8 Compliance

Ethics Case Studies, Volume II

1 hour

This course is approved for Ethics and Professional Responsibility credits for several different jurisdiction and licenses.

In this course, you will cover:

- A case study dealing with a client changing their retirement plans to assist another with a business venture.
- A case study dealing with mistake made by a professional referral

For both cases, discussion will cover:

- The advisor's role and responsibilities.
- Possible handling of ethical and regulatory dilemmas.
- Steps to prevent problems before they arise.

British Columbia	1 Life and 1 General Credit
Alberta	1 Life and 1 A&S Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Professional Responsibility Credit
Advocis	1 Professional Responsibility Credit

Optimizing the Engagement Process

1 hour

Learn what the best practices for an Engagement Process are. Check if your Engagement Process matches with industry standards. See how to use the Engagement Process to get the most out of your client relationships.

British Columbia	1 Life and 1 General Credit
Alberta	1 Life and 1 A&S Credit
Saskatchewan	1 Life, 1 Approved Ethics Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Professional Responsibility Credit
Advocis	1 Professional Responsibility Credit
IIROC	1 Credit for Cycle 8 Professional Development

Financial Planning

Advanced Needs Analysis

1 hour

Needs analyses are a crucial part of an application for insurance. A more accurate and in-depth needs analysis will help you provide better customer service and give more options for the clients. This course will look past income-based needs analysis and at needs-based analysis, which is a more accurate and robust approach. We will also glance at needs analysis for critical illness and disability insurance, taking in some considerations when analyzing the client's need for insurance. Please note, this course requires previous knowledge of Time Value of Money and/or use of a financial calculator. **This course is also meant to mimic a case study, course difficulty level is advanced and more suited with CFP students.**

British Columbia	1 Life Credit
Alberta	1 Life and 1 A&S Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

CPP Overview

1hour

This course is the kickoff for our CPP series. It does not assume any prior knowledge but is also a good refresher for seasoned financial advisors. Covering topics from contributions to benefits to various scenarios provides a good basis for digging deeper into specific aspects of the Canada Pension Plan.

British Columbia	1 Life Credit
Alberta	1 Life and 1 A&S Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

CPP Benefits

1 hour

This course takes a close look at Canada Pension Plan benefits including calculation, income splitting, disability and Survivor's Benefits. This course is part of our CPP series which begins with "CPP Overview."

British Columbia	1 Life Credit
Alberta	1 Life Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

Fundamentals of RRSPs

1 hour

Registered Retirement Savings Plans are one of the most widely used registered plans for retirement. This course will help you better understand the mechanics of RRSP's and will go through the plan from contributions to withdrawals and death. This course is also a great refresher.

British Columbia	1 Life Credit
Alberta	1 Life Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

Government Benefits other than CPP

1 hour

This course looks at the benefits available from the government other than the Canada Pension Plan. Jason discusses Old Age Security, Guaranteed Income Supplement, The Allowance, Worker's Compensation, Employment Insurance and the Canada Health Act.

British Columbia	1 Life Credit
Alberta	1 Life and 1 A&S Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

Government Disability Benefits

1 hour

This course looks at the different government disability benefits available including CPP, Worker's Compensation, EI, provincial disability supports and discusses coordination of benefits.

British Columbia	1 Life Credit
Alberta	1 A&S Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

Planning for Disabled Persons

1.5 hours

This course will discuss all of the different benefits available for disabled persons including disability tax credit, RDSP, provincial disability supports and trust for disabled persons.

British Columbia	1.5 Life Credit
Alberta	1.5 Life and 1 A&S Credit
Saskatchewan	1.5 Life Credit
Manitoba	1.5 Life and/or A&S Credit
Ontario	1.5 CE Credit
FP Canada	1.5 Financial Planning Credit

Registered Pension Plans

1 hour

Strengthen your knowledge of registered pension plans including defined benefits and defined contribution plans. This course will also discuss other topics including leaving a pension plan, commuted value and pension adjustment reversals.

British Columbia	1 Life Credit
Alberta	1 Life Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

Structure of Benefit Plans

1 hour

This course will discuss a brief history of group benefits, contracts participants, different plan members and classes, legal concepts surrounding benefits plans. We also will go over tax basics and implications with benefit plans and typical benefit provision you see with group benefits.

British Columbia	1 Life Credit
Alberta	1 A&S Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

Trends in Financial Planning Research

1 hour

This course is an in-depth topic about financial planning research. We are going to look at who is conducting this research and where this research comes from, what is the aims of the research and what are the different topics studied. We will discuss some concerns and problems surrounding financial planning research and as a financial planner, ways you can access academic studies and research. We will end with different findings of interest our instructor Jason has come across.

British Columbia	1 Life Credit
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Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

Taxation

Corporate Taxation

1 hour

This course is an advanced course taxation course. Recommended for CFP students, this course will go over some principles of corporate taxation. Some common topics that will be discussed are lifetime capital gains exemption, section 85 rollover, and the RDTOH account. This course does not provide tax advice; please consult a tax specialist for a true assessment.

British Columbia	1 Life Credit
Alberta	1 Life, 1 A&S and 1 General Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

Personal Taxation

1 hour

Go beyond basic tax calculations and improve your understanding of the Canadian tax system. Topics include taxation of dividend income, investment income and capital gains; income splitting; and TFSAs. This course is not meant to give tax advice. Please consult a tax specialist for your specific situation.

British Columbia	1 Life Credit
Alberta	1 Life Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

Taxation of Life Insurance

1 hour

This course will discuss the different tax implications on various stakeholders of a life insurance contract. This course is meant to enhance your tax knowledge and to help your understanding of certain tax rules. Some topics will include partial surrenders, adjusted cost base and policy loans. This course is not designed to provide tax advice.

British Columbia	1 Life Credit
Alberta	1 Life Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

Insurance

Beneficiary Designations

1.5 hours

This course is a look at beneficiary designations and includes a legislative overview and exploration of different products in the common law provinces and territories (excludes Quebec).

Topics included are life insurance, A&S products, Segregated funds and insurance, investments, pensions, group benefits, RRSP & RRIFs, TFSA, RDSP, RESP, Wills, and Trust. **This course is not designed to provide legal advice. Please consult a professional if you have questions.**

British Columbia	1.5 Life Credit
Alberta	1.5 Life and 1.5 A&S Credit
Saskatchewan	1.5 Life Credit
Manitoba	1.5 Life and/or A&S Credit
Ontario	1.5 CE Credit
FP Canada	1.5 Financial Planning Credit

Buy/Sell Arrangements

1 hour

This course takes an in-depth look at the different types of life insurance that can be held by a corporation, as well as some tax consequences of a corporation owning a life insurance contract. This is a good course for those who have many clients that are also business owners. These insurance policies can be recommended to the clients when writing up their needs analysis.

Some insurance policies we cover are:

- Key Person Insurance
- Business Overhead Expense
- Buy-Sell Agreements

British Columbia	1 Life Credit
Alberta	1 Life and 1 A&S Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

Disability Insurance Basics

1 hour

Disability insurance can be a complex product. This course will go over the steps of constructing a disability policy, from the needs analysis to the different riders, wavier and benefits.

British Columbia	1 Life Credit
Alberta	1 A&S Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

Insurance Concepts

1 hour

This course will help refresh the concepts about insurance contracts. These topics include some of the fundamentals of insurance contracts to some topics that work in the background of the insurance world. These topics will include TIAs, underwriting decisions and calculation of insurance premiums. We will also look at re insurance and Assuris, which will enhance your insurance knowledge.

British Columbia	1 Life Credit
Alberta	1 Life and 1 A&S Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

Life Insurance Products

2 hours

This course will refresh your knowledge on each of the life insurance products. We look through term insurance, whole life insurance and universal life insurance. These products can be combined to meet the needs of your client. Highly recommended for students who are involved with life insurance.

British Columbia	2 Life Credit
Alberta	2 Life Credit
Saskatchewan	2 Life Credit
Manitoba	2 Life and/or A&S Credit
Ontario	2 CE Credit
FP Canada	2 Financial Planning Credit

Participating Whole Life

1 hour

Whole life insurance is a very popular choice of life insurance for many reasons. Participating whole life policies offer a layer of complexity with the distribution of policy dividends. We will talk in depth about how these dividends are generated and the various ways a policy holder can receive them.

British Columbia	1 Life Credit
Alberta	1 Life Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

Role of the Executor

1 hour

This course will explain in depth the role of an executor. This will help any life insurance advisor better guide their client through the process of death and other considerations around death.

British Columbia	1 Life Credit
Alberta	1 Life Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit
Advocis	1 Financial Management Credit

Segregated Funds

1.5 hours

This course will provide an in-depth look into segregated funds. Also called Individual Variable Insurance Contracts (IVIC), these are separate products from normal insurance products that might appeal to a wide variety of clients. Starting with an introduction of mutual funds, we will go through the structure of a segregated fund, taxation of the segregated fund and discuss the type of clients who buy segregated funds.

A full list of topics includes:

- Mutual funds basics and Taxation
- Segregated fund basics and death benefits
- Resets
- Deposit and Maturity
- Taxation of Segregated funds
- Seg Fun Structures
- Linear reduction method and Proportional reduction method
- Assuris guarantees and seg fund markets

British Columbia	1.5 Life Credit
Alberta	1.5 Life Credit
Saskatchewan	1.5 Life Credit
Manitoba	1.5 Life and/or A&S Credit
Ontario	1.5 CE Credit
FP Canada	1.5 Financial Planning Credit

Group Insurance

Contractual Provisions Part 1

2 hours

This course will cover off the first part of the many contractual provisions and definitions that govern the terms of the standard benefit contract.

Within the contract the insurance company defines such terms such as who is an eligible employee, what constitutes an accident, who are eligible dependents, what constitutes eligible earnings for benefit calculation purposes, time frames for eligibility and waiting periods, mandatory versus non-mandatory coverage, contributory versus non-contributory plans.

Given the breadth of contractual provisions and definitions in the standard contract we have broken this material into two separate modules

British Columbia	2 Life Credit
Alberta	2 A&S Credit
Saskatchewan	2 Life Credit
Manitoba	2 Life and/or A&S Credit
Ontario	2 CE Credit

Contractual Provisions Part 2

2 hours

This course will cover off the second part of the contractual provisions and definitions that govern the terms of the standard benefit contract.

Some of the areas covered will include billing options, premium administration requirements such as what happens if premiums are not paid, co-ordination of benefit provisions and rules governing termination of the policy contract to name just a few of the many topics covered in this module.

British Columbia	2 Life Credit
Alberta	2 A&S Credit
Saskatchewan	2 Life Credit
Manitoba	2 Life and/or A&S Credit
Ontario	2 CE Credit

Dental Care

1.5 hours

This course Dental Care Benefit covers all aspects of the dental services product.

We will cover the three levels of coverage available, which comprise Basic, Major and Orthodontic services and the level of services within each, the plan design cost control elements of benefit level selection, co-insurance, deductibles, maximums, recall periods and fee guides, and finally the services covered under each level of coverage, alternate treatment, survivor benefits and expenses not covered under a standard dental benefit plan.

British Columbia	1.5 Life Credit
Alberta	1.5 A&S Credit
Saskatchewan	1.5 Life Credit
Manitoba	1.5 Life and/or A&S Credit
Ontario	1.5 CE Credit

Extended Health Care Benefit

1.5 hours

The course titled Extended Health Care Benefit covers all aspects of this medical care product.

We will cover the benefits available to plan members to treat those medical products and services not covered under their respective provincial health care plan.

We will learn about drug plan options, paramedical services such as chiropractors, massage therapists and others, vision care, hospital benefits, out of country/province emergencies, and the other products and services covered under a standard benefit contract.

In addition to the products and services we will also cover off the plan design options such as deductibles, coinsurances, maximums and formulary cost management features.

British Columbia	1.5 Life Credit
Alberta	1.5 A&S Credit
Saskatchewan	1.5 Life Credit
Manitoba	1.5 Life and/or A&S Credit
Ontario	1.5 CE Credit

Group Insurance Overview and Benefits

2 hours

A common way for an individual to have insurance is through an employer sponsored group plan. This course will go discuss the way group insurance policies are formed and priced. Recommended for all financial services professionals.

British Columbia	2 Life Credit
Alberta	2 Life and 2 A&S Credit
Saskatchewan	2 Life Credit
Manitoba	2 Life and/or A&S Credit
Ontario	2 CE Credit
FP Canada	2 Financial Planning Credit

Group Life Insurance, Accidental Death and Dismemberment and Dependent Life Insurance

2 hours

This course titled Life/Accidental Death & Dismemberment/Dependent life deals with all forms of life insurance available through a group benefit program.

Products covered include the Employee base life insurance benefit and Accidental Death & Dismemberment, Optional life and Accidental Death & Dismemberment insurance for the employee, spouse and dependents, as well as Dependent Life insurance.

Covered topics include plan design options, benefit provisions and coverage details, underwriting rules and requirements, beneficiaries and taxation of benefits.

British Columbia	2 Life Credit
Alberta	2 A&S Credit
Saskatchewan	2 Life Credit
Manitoba	2 Life and/or A&S Credit
Ontario	2 CE Credit
FP Canada	2 Financial Planning Credit

Health and Dental Coverage and Claims

1 Hour

This is a 1-hour course. In addition to provincial health care, many individuals and families purchase extended health and dental care. Also included in many group plans, this course will help explain the different aspects of extended health care such as basic health and dental care, coordination of benefits, medical expense tax credit, and private health services plan.

British Columbia	1 Life Credit
Alberta	1 A&S Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

Long Term Disability

2 hours

This course titled Long Term Disability covers all aspects of this wage replacement product.

We will cover the benefit available to disabled members, both on a taxable and non-taxable basis, the available benefit durations, elimination periods and the criteria under which benefits are available or not available or reduced.

British Columbia	2 Life Credit
Alberta	2 A&S Credit
Saskatchewan	2 Life Credit
Manitoba	2 Life and/or A&S Credit
Ontario	2 CE Credit

Weekly Income Benefit

1.5 hours

The module titled Weekly Income Benefit covers all aspects of this short-term wage replacement product.

We will cover the benefit available to disabled members, both on a taxable and non-taxable basis, the available benefit durations, elimination periods and the criteria under which benefits are available or not available or reduced.

Lastly, we'll learn how the Weekly Income benefit integrates with the federal governments Employment Insurance disability premium reduction program.

British Columbia	1.5 Life Credit
Alberta	1.5 A&S Credit
Saskatchewan	1.5 Life Credit
Manitoba	1.5 Life and/or A&S Credit
Ontario	1.5 CE Credit

Canadian Regulation

FINTRAC & Reporting Regulation

1 hour

A detailed overview of what FINTRAC is, who has responsibility under FINTRAC as a reporting entity, what types of transactions must be reported to FINTRAC, the penalties for not reporting correctly to FINTRAC and best practices to encourage compliance.

British Columbia	1 Life Credit
Alberta	1 Life and 1 A&S and 1 General Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

Fraud Detection and Prevention

1 hour

Fraud detection and prevention is an integral part of running a business. In this course you will learn tips and trick to how to spot fraud in your personal life and with your clients. We will first go through what is fraud, then look at five different types of fraud: phishing, spoofing, phone scams, man in the middle attacks, and identity theft. We will identity when that these types of fraud occur and prevent them when possible. Course time frame is one hour.

British Columbia	1 Life Credit
Alberta	1 Life and 1 A&S and 1 General Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

Legal Basics

1 hour

This course introduces the Canadian legal system before discussing legal relationships, corporation basics and trusts. The course covers the role of the courts, legislation, and regulation.

This course is not designed to provide legal advice. Please consult a professional if you have questions.

British Columbia	1 Life Credit
Alberta	1 Life, 1 A&S Credit and 1 General credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

Privacy Legislation in Canada

1.5 hours

This course will answer some questions around the privacy laws in Canada, such as:

- What privacy rules are out there?
- What rules impact me and my company?
- Why do I need to follow these rules?
- What are the best practices for managing client privacy?

British Columbia	1.5 Life Credit
Alberta	1.5 Life and 1.5 A&S and 1.5 General Credit
Saskatchewan	1.5 Life Credit
Manitoba	1.5 Life and/or A&S Credit
Ontario	1.5 CE Credit
FP Canada	1.5 Financial Planning Credit
Advocis	1.5 Financial Management Credit

Practice Management

Big Data and the Industry

1 hour

This is a one-hour course focus on answer 4 questions are Big Data. We will go through some of the concepts of big data, identify what this is and some examples of big data. Why this is a trend, certain issues that make big data more and more prevalent in the news and online. How is data being collected and a few of the big collectors of data and how these practices are related to the financial services industry. Finally, we will look at how this data is being used specifically how insurance company can and are using big data.

British Columbia	1 Life Credit
Alberta	1 Life and 1 A&S Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

Customer Service Fundamentals

1 hour

This is a one-hour course focused on enhancing your customer service skills. Based on four customer service concepts. First, we have self awareness, being aware of what you are bring to the table as a person in a customer service industry. Speech is an important are of being able to communicate effectively to your customers and to be able to get the right reaction. The last two concepts we will explore are "Listen first and answer later" and "Always start from zero". Using these concepts, we hope to show you the most effective way to communicate.

Alberta	1 Life and 1 A&S Credit
FP Canada	1 Financial Planning Credit

Introduction to Cryptocurrency

1 hour

The course is centered around answering five questions that make up the outline of this course:

- What is cryptocurrency? Discussing the overview of cryptocurrency and some fundamental concepts to understand cryptocurrency. And several types of cryptocurrency
- What is a block chain? One of the ideas that underlie how cryptocurrency currently work.
- How do you get cryptocurrency? How Canadians can get a hold of this currency.
- Is cryptocurrency risky? Both the risks of buying and selling cryptocurrency and is it a viable investment vehicle.
- What's next for cryptocurrency? Upcoming trends and the underlying technologies that make it possible

British Columbia	1 Life Credit
Alberta	1 Life Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

Making Meetings Successful

1 hour

This is a 1-hour course. We will be discussing elements that will help make your meetings run smoothly, more productive and effective. First looking at the three parts of a meeting, then how to run a corporate or business meeting, a client meeting and a public meeting.

Alberta	1 Life and 1 A&S Credit
FP Canada	1 Financial Planning Credit

Managing Cyber-Risk

1 hour

This is a 1-hour course. In this course, we will focus on answering these questions:

- What is Cyber-risk? Talking about the development that leads us to have this type of risk. How cyber-risk can impact your business.
- How does risk management apply to cyber-risk?
- What are some ways to reduce cyber-risk? We will look at the impact and frequency of occurrence
- How does cyber-insurance work?

British Columbia	1 Life Credit
Alberta	1 Life and 1 A&S Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit

Planning for Success

1 hour

This is a 1-hour course. The course goes through answering some key questions:

- What is a business case?
- What is a growth strategy?
- What technique and tolls can I use for planning?

Alberta	1 Life and 1 A&S Credit
FP Canada	1 Financial Planning Credit

Presenting Yourself Professionally – All About You

1 hour

This is the first part of our three-part series on Presenting Yourself Professionally. First, we will discuss "what is professionalism" and how self awareness in the workplace can impact how one presents themselves professionally in the workplace. We will show some statistics and research that can be found relating to professionalism. Aptitude, appearance and attitude will be presented as pillars of professionalism and with attitude, we will look further into competencies and behaviour. We will end with some final thought about professionalism.

Alberta	1 Life and 1 A&S Credit
FP Canada	1 Financial Planning Credit

Presenting Yourself Professionally – Meeting Management

1 hour

This is the second part of our three-part series on Presenting Yourself Professionally and will focus on professionalism through meetings. The topics we will go through are meeting management, meeting behaviour checklist, why meetings go wrong, meeting mistakes, successful meeting checklist, setting the stage and virtual meetings. Meeting etiquette is important to run your meetings successfully to further grow your business.

Alberta	1 Life and 1 A&S Credit
FP Canada	1 Financial Planning Credit

Presenting Yourself Professionally – Social Media

1 hour

This is the last part of out three-part series on Presenting Yourself Professionally and will specifically focus on social media. We will explore what your expected outcomes when using social media and look at some successful examples and how to achieve these results through the development of a social media plan.

Alberta	1 Life and 1 A&S Credit
FP Canada	1 Financial Planning Credit

Business Planning Video Series

The Business Planning Videos Series is an eight-part video series that takes you through guiding your business owner clients as a financial planner. This series will cover different stages of owning a business from the inception of the business, building the business and the prep and the completed sale of a business.

Part 1

1 hour

This is the introduction to the business planning series. We will look through how to start a small business and what kinds of business will qualify as a small business therefore be able to use the small business rate.

Topics discussed:

- Introduction
- Corporate Basics
- Review of Depreciation
- Share Structures
- Small Business Corporation and Personal Small Business

British Columbia	1 Life Credit
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FP Canada	1 Financial Planning Credit

Part 2

1 hour

Continuing our introduction. Forming a new incorporated business is not too complex of a task. We will look at how corporation control will work, what kind of corporations are related or connected. This will impact the ability to use the small business deduction. Using Section 85 to transfer assets into a corporation tax free and starting out with the basics of dividends.

Topics discussed:

- Corporation control
- Unanimous shareholders agreement
- Section 85 rollover
- Related, associate, affiliated and connected corporation
- Dividend basics

British Columbia	1 Life Credit
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Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

Part 3

1 hour

In part will take more in depth about dividends. We will look at the two main types of dividends that can be paid out of a small business corporation. We will also look at how passive income is treated within a corporation.

Topics discussed:

- Eligible Dividends
- Non-Eligible Dividends
- Passive Income in a Corporation
- RDTOH

British Columbia	1 Life Credit
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Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

Part 4

1 hour

Continuing our discussions on dividends, we will look at the capital dividend account which pay out a special kind of dividend called the capital dividend. We will also discuss the ACB and PUC of shares. Lastly, we will look the ins and outs of the Lifetime Capital Gains Exemption.

Topics discussed:

- Capital Dividends Account
- Capital Dividends
- ACB and PUC
- Lifetime Capital Gains Exemption – Intro, Limitations and Purifying

British Columbia	1 Life Credit
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FP Canada	1 Financial Planning Credit

Part 5

1 hour

Finishing up the discussion of the Lifetime Capital Gains exemption we will continue our business discussions on holding companies and how you can use a holding company to your advantage to freeze the value of your shares.

Topics discussed:

- Lifetime capital gains exemption – Crystallizing
- Role of a Holding Company
- Adding a Holding company using Section 85
- Section 86 (Freezing)
- Stop Loss Rules

British Columbia	1 Life Credit
Alberta	1 Life and 1 A&S Credit
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Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

Part 6

1 hour

In this part, we will mainly look at buy/sell agreements and we will go through numerous examples of different types of buy/sells.

Topics discussed:

- Buy-sell Basics
- Share-redemption 50% method and 100% method
- Promissory Note uses
- Put/Call Buy Sell

British Columbia	1 Life Credit
Alberta	1 Life and 1 A&S Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit

Part 7

1 hour

In this part our focus is estate freezes, so being able to freeze the value of your shares to capture a higher ACB of your share therefore decreasing your tax liability at death. This is also a great way to start your succession of your business.

Topics discussed:

- Disability Buy Sell
- Estate Freeze, types and methods
- Refreezes
- Partial Freezes
- Melt/ Thaw

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FP Canada	1 Financial Planning Credit

Part 8

1 hour

Lastly, we will look at how to sell our business, winding it up and how to retire your holding company.

Topics discussed:

- Share sales
- Asset sales
- Corporate valuation
- Holing company retirement

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CE Drive Podcast

Season One

S01E01 – Disability Tax Benefits

In this very first episode of CE Drive, Jason discussed disability tax benefits, their pros and cons, and their nuances with his guests, Derek and Melanie.

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S01E02 – Unraveling Divorce

In this episode, Jason and his guests, Kelly and Jeff, talked about divorce from the perspective of financial planning.

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S01E03 – Advisor Education

In this episode, Jason discussed the benefits of advisor education, how to choose the education that works for you, and much more with his guests, Kent and Ian.

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S01E04 – Canada Pension Plan Decisions

In this episode, Jason and his guests, Kent and Marshall, talk about Canada Pension Plan and how to utilize it.

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Advocis	1 Financial Management Credit

S01E05 – Behavioural Finance

In this episode, Jason and his guests, Kelvin and Derrick, share insights about managing assets.

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S01E06 – Client Asset Management

In this episode, Jason and his guests, Kelvin and Derrick, share insights about managing assets.

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Manitoba	1 Life and/or A&S Credit
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Advocis	1 Financial Management Credit

S01E07 – Optimizing Client Value

In this episode, Jason and his guests, Kelvin and Derrick, share insights about managing assets.

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Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
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S01E08 – Retirement Planning

In this episode, Jason and his guests, Chris, Craig, and Mitchell, share their ideas and experiences in retirement planning.

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S01E09 – Registered Disability Savings Plan

In this episode, Jason and his guests, Craig and Ian, revisit financial planning for people with disabilities, specifically regarding the RDSP.

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S01E10 – Financial Planning Concepts

In this episode, Jason and his guests, Shyam and Chris, discussed two specific financial planning cases. One of them is about clients who are small business owners and the other about clients who are relocating to Canada from the U.S.

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Alberta	1 Life Credit
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S01S01 – CFP Board Research

In this bonus episode, Jason is on location at the CFP Board Conference with Ryan and Tanya. They share their experiences at the conference and their favorite sections.

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Manitoba	1 Life and/or A&S Credit
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Season Two

S02E01 – Capacity Concerns

Join Jason and his guests Mitchell and Garrett as they discuss buying a block of investment business, and getting clients used to hearing retirement advice from a young advisor.

British Columbia	1 Life Credit
Alberta	1 Life and 1 A&S Credit
Saskatchewan	1 Life Credit 1 Ethics Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Professional Responsibility Credit
Advocis	1 Ethics Credit

S02E02 – Generating Value for Clients

In this episode, Jason and his guests, Derek and Dawn, explore complex financial planning topics covering capacity concerns.

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Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
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S02E03 – Unconventional Solutions

In this episode, Jason and his guests, Nathen and Kelley, talked about using elements of the financial planning process to bring values to their clients.

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S02E04 – Getting Started

In this episode, Jason and his guests, Mitchell and Megan, explore some unusual solutions to unusual problems.

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Ontario	1 CE Credit
FP Canada	1 Practice Management Credit
Advocis	1 Financial Management Credit

S02E05 – Certification and Incorporation

Join Jason and Ray as they discuss the benefits of incorporation for a medical professional. They also discuss the state of regulation of financial planning and financial advice.

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Manitoba	1 Life and/or A&S Credit
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Advocis	1 Financial Management Credit

S02E06 – Incorporation

Join Jason and Ray as they continue their discussion about incorporating!

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Alberta	1 Life and 1 A&S Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
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Advocis	1 Financial Management Credit

S02E07 – Debt Management

Join Jason and Ian in this episode about debt management.

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Alberta	1 Life Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
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S02E08 – Insuring Business Owners

In this episode, Jason and Michael discuss a couple of scenarios in which Michael was able to put insurance in force to support buy-sell

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Saskatchewan	1 Life Credit
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S02E09 – OCIO Part 1

In this episode, Jason and his guests, Kelvin and Derrick, share insights about managing assets.

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S02E10 – OCIO Part 2

Join Jason and Steve for a discussion of the role of the Outsourced Chief Investment Officer.

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S02E11 – RRIF Beneficiary Gone Wrong

Jason and his guest, Chris, discuss a RRIF beneficiary designation gone wrong and how it was resolved.

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S02E12 – Retirement Planning and CPP Disability

In this episode, Jason and his guests, Tab and Brad, discuss retirement planning, specifically pensions and CPP disability.

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Saskatchewan	1 Life Credit
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S02E13 – Life Insurance Leverage

In this episode, Jason and Darren discuss life insurance leverage strategy.

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S02E14 – Mental Health and Underwriting

Join Jason and Jessica for a discussion of insurance underwriting.

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S02E15 – Contingency Planning for Businesses

Join Jason and Erin for a discussion of the perils of business owners who have not done sufficient personal planning, and how the advisor can help mitigate these concerns.

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S02S16 – Cash Flow Planning for Business Owners

Join Jason and Lisa for a discussion of cash flow planning for business owners.

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Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
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Advocis	1 Financial Management Credit

S02E17 – Incapacity Planning

Join Jason and Erin for a discussion of incapacity concerns, followed by Jason discussing policies and procedures for testing a client's capacity.

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S02E18 – Business Valuation

Join Jason and Certified Business Valuator Eric Mah for a discussion of business valuation principles.

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S02E19 – Group Benefits: Communication and Risk

Join Jason and group benefits broker Lori Power for a discussion of communication and risk issues in group benefits contracts.

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S02E20 – Content Marketing

Join Jason and advisors Shawn Todd and Corey Butler.

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Season Three

S03E01 – Workers Compensation

Join Jason and lawyer Howard Goldford discussing how WCB in Alberta administers claims, how disputes are handled, and how this relates to other income loss benefits.

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S03E02 – Freelancing in Financial Planning

Join Jason and financial planner Alexandra Macqueen for a wide-ranging discussion concerning a range of financial planning issues.

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S03E03 – Introducing the CPP Calculator

Join Jason and financial planner and entrepreneur David Field for a discussion of David's online CPP calculator.

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S03E04 - Estate Planning Challenges for Financial Advisors

Join Jason and financial planners Christopher and Steven as they discuss some of the challenges financial advisors encounter in helping clients with their estate planning.

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S03E05 – Retirement Compensation Arrangement

Join Jason and financial planner Tim as they discuss the Retirement Compensation Arrangement from both a technical and behavioural perspective.

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S03E06 – RDSP Specialist

Join Jason and financial planner Johnathan as they discuss the finer points of the RDSP. Johnathan is highly knowledgeable about the RDSP and teaches Jason a few things along the way!

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S03E07 – Advising Physicians

Join Jason and financial planner Adrian George as they discuss advising physicians. They discuss Adrian's path to deal with physician clients. Adrian's technical expertise and knowledge of behavioural finance concepts play prominently in his practice.

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S03E08 – AML Why it Matters

Join Jason and AML expert Mike Cosgrove of TAMLO as they discuss the realities of money laundering and how it impacts financial services professionals.

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S03E09 – Nerding out on Group Benefits

Join Jason and Dave Patriarche of Canadian Group Insurance Brokers and Mainstay Insurance. Dave is one of Canada's leading authorities on group benefits.

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S03E10 - TPAs and Other Acronyms You Need to Know

Join Jason and Mike McClenahan of Benefits By Design (BBD) and president of the Third Party Administrators Association of Canada (TPAAC). Mike covers a broad range of group benefits topics, including building a business, the importance of education, and flexible benefit plans.

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S03E11 - Retirement Income Planning

Join Jason and Mark Walhout of Walhout Financial for a discussion around retirement planning. Mark applies an evidence-based approach to retirement income planning and only serves families who are anticipating retirement.

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S03E12 – HSAs and the Value of Expertise

Join Jason and Steve McEwan of MyHSA for a conversation concerning Health Spending Accounts. Steve is one of Canada's leading experts in the field. He understands the taxes and the risks of these plans and has built a successful business providing service to advisors.

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S03E13 – The Overlap Between the Leasing Business and Financial Planning

Join Angela Armstrong of Prime Capital for a discussion of the leasing business. Angela has been providing capital to small and medium businesses for two decades. Her relationship with her customers will sound very familiar to any financial advisor.

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S03E14 - The Truth About Health Care Preferences

Join Dr Daren Heyland of www.planwellguide.com for a discussion about health care decision-making and preferences. Dr Heyland discusses where financial advisors could better position health care decision-making

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IIROC	1 Credit for Cycle 8 Professional Development

S03E15 – Deciphering Cryptocurrency Part I

Cybersecurity consultant Mike Alguire joins Jason for a discussion of all things crypto-currency in the first of a two-part series. In this episode we discuss the mysterious origins of bitcoin and what mining is.

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Ontario	1 CE Credit
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Advocis	1 Financial Management Credit
IIROC	1 Credit for Cycle 8 Professional Development

S03E16– Deciphering Cryptocurrency Part II

Cybersecurity consultant Mike Alguire joins Jason for a discussion of all things crypto-currency in the second of a two-part series. In this episode we discuss bitcoin mining and investing in cryptocurrencies.

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Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
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IIROC	1 Credit for Cycle 8 Professional Development

S03E17 – Retirement Planning Scenarios

Advice-only financial planner Brett Martinson joins Jason for a discussion concerning three separate retirement planning scenarios.

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Advocis	1 Financial Management Credit

S03E18 – Life Insurance Fundamentals

Financial planner and insurance specialist Jeremiah Renner joins Jason and shares the secret sauce that help him succeed in the family insurance market.

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S03E19 – Ethics Lessons from Season 3 Part I

Jason mines content from the first 8 episodes of Season 3 for content with an ethics perspective. This episode features short clips from those interviews followed by discussion about how the content fits with financial planning and insurance codes of conduct.

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FP Canada	1 Financial Planning Credit
Advocis	1 Professional Responsibility Credit
CECAP	1 Credit for Cycle 8 Compliance

S03E20 – Ethics Lessons from Season 3 Part I

Financial planner Melany Goodhue joins Jason to discuss a highly complex case where a pension buyback coincides with a number of other financial planning decisions.

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Alberta	0.5 Life and 0.5 A&S Credit
Saskatchewan	1 Life Credit
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S03E21 – Advice-Only Planning

Available on June 23, 2021

Financial planner Julia Chung joins Jason to discuss operating an advice-only financial planning practice.

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Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Practice Management Credit
Advocis	1 Financial Management Credit
CECAP	1 Credit for Cycle 8 Professional Development

S03E22 – Group Benefits Two Perspectives

Insurer executive Meghan Vallis joins Jason for a wide-ranging discussion of topics in group benefits.

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Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit
Advocis	1 Financial Management Credit
CECAP	1 Credit for Cycle 8 Professional Development

S03E23 - Intro to Impact Investing

Impact Investing guru David O'Leary joins Jason for a look at the tools financial advisors have available for clients who want to introduce values into their financial plans.

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Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
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Advocis	1 Financial Management Credit
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S03E24 - The Role of Financial Therapy

Financial Therapist Nathan Astle joins Jason to explain the differences between financial planning and financial therapy, and how a financial planner can send their client to a therapist.

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Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
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S03E25 - Property and Casualty Risks in Financial Planning

Financial Planner and Property & Casualty insurance professional Chad MacKenzie joins Jason for a look at what financial planners need to know about P&C insurance.

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Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
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Season 4

S04E01 - IPP – A Masterclass

HNW planning consultant and tax lawyer Trevor Parry joins Jason for an in-depth look at IPPs, including who they work for and who they don't.

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Alberta	1 Life Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit
Advocis	1 Financial Management Credit
CECAP	1 Credit for Cycle 9 Professional Development

S04E02 - Retirement Planning – Endowments and RRIFs

Private wealth counsellor Marshall McAlister joins Jason for a discussion of endowments, RRIFs, and a brief discussion about upcoming Client Focused Reform changes.

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Alberta	1 Life Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
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Advocis	1 Financial Management Credit
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S04E03 - Therapy Tools in a Planning Practice

Financial planner Natasha Knox joins Jason for a discussion of how a financial planner develops financial therapy tools and brings this into a financial planning process.

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Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit
Advocis	1 Financial Management Credit
CECAP	1 Credit for Cycle 9 Professional Development

S04E04 - The F-Word and Other Regulatory Concerns

Financial planner Jason Pereira joins Jason for a discussion around the fiduciary standard and what it means for financial advisors.

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Saskatchewan	1 Life Credit
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Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit
Advocis	1 Financial Management Credit

CECAP	1 Credit for Cycle 9 Professional Development

S04E05 - Wealth Management and Financial Planning

Investment researcher Dan Hallett joints Jason for a discussion of investment management in the financial planning context.

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Alberta	1 Life Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
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S04E06 - Family Law 101

Family law practitioner Fiona McLean joins Jason for a look at the various elements of family law that financial planners need to be concerned with.

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Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
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S04E07 - Financial Education Using Technology

Impact Entrepreneur Trevor Schonewille joins Jason for a discussion around building a technology platform for financial literacy education.

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Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
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S04E08 - Professional Trustee Services

Professional Trustees Darrel Johnson and Jamie Kidd join Jason to discuss the role of the professional trustee.

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Alberta	1 Life Credit
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Manitoba	1 Life and/or A&S Credit
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S04E09 - Regulation: Tales from the Front Lines

Compliance pro Curtis Findlay and Regulatory Affairs lawyer Ed Skwarek join Jason for a discussion of the framework behind compliance and regulation.

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Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
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FP Canada	1 Financial Planning Credit
Advocis	1 Financial Management Credit
CECAP	1 Credit for Cycle 9 Professional Development

S04E10 - Consumer Advocate

Portfolio Manager John de Goey joins Jason for a discussion covering a wide range of topics, including asset bubbles, the role of public policy, and financial planning research.

British Columbia	1 Life Credit
Alberta	1 Life and 0.5 A&S Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit
Advocis	1 Financial Management Credit
CECAP	1 Credit for Cycle 9 Professional Development

S04E11 - Using Technology to Improve Client Onboarding

Advisor and FinTech entrepreneur Brandon Chapman joins Jason for a discussion of how Brandon built a tech tool to simplify client onboarding.

British Columbia	1 Life Credit
Alberta	1 Life Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit
MFDA	1 Credit for Professional Development
Advocis	1 Financial Management Credit
CECAP	1 Credit for Cycle 9 Professional Development

S04E12 - Joint Ownership and Why Jason Hates It

Recently minted CFP® Professional Christian Battistelli joins Jason for a discussion around joint ownership.

British Columbia	1 Life Credit
Alberta	1 Life Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit
MFDA	1 Credit for Professional Development
Advocis	1 Financial Management Credit
CECAP	1 Credit for Cycle 9 Professional Development

S04E13 - Advice Only Planning with DIY Investors

Advice Only Planning Russell Sawatsky joins Jason for a discussion of working with DIY investors. We also touch on working with clients with US connections.

British Columbia	1 Life Credit
Alberta	1 Life Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit
MFDA	1 Credit for Professional Development
Advocis	1 Financial Management Credit
CECAP	1 Credit for Cycle 9 Professional Development

S04E14 - Implementing the IPP and RCA

Executive Compensation consultant Fraser Lang joins Jason for a look at some of the practical implications of the Individual Pension Plan and Retirement Compensation Arrangement.

British Columbia	1 Life Credit
Alberta	1 Life Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit
MFDA	1 Credit for Professional Development
Advocis	1 Financial Management Credit
IIROC	1 Credit for Cycle 9 Professional Development

S04E15 - Investment Advice in a Fee Only World

Financial Planner and Analyst Darryl Brown joins Jason for a discussion of how fee-only financial planning clients get investment advice, and some lessons from his past career as a financial analyst.

British Columbia	1 Life Credit
Alberta	1 Life Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit
MFDA	1 Credit for Professional Development
Advocis	1 Financial Management Credit
IIROC	1 Credit for Cycle 9 Professional Development

S04E16 - Using a Digital Asset Manager

Insurance Manager Ray Zadrey and Customer Success Manager Mona Zabet join Jason for a discussion of how an insurance team uses a digital asset manager.

British Columbia	1 Life Credit
Alberta	1 Life Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit
MFDA	1 Credit for Professional Development
Advocis	1 Financial Management Credit
IIROC	1 Credit for Cycle 9 Professional Development

S04E17 - Catastrophic and Routine Risks in Benefits Plans

Canadian Group Insurance Brokers founder Dave Patriarche joins Jason to discuss where group benefits plans have risk.

British Columbia	1 Life Credit
Alberta	1 A&S Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit
MFDA	1 Credit for Professional Development
Advocis	1 Financial Management Credit
IIROC	1 Credit for Cycle 9 Professional Development

S04E18 - Appropriate Leverage Using Insurance

Lifelong learner and insurance wholesaler Amanda joins Jason for a conversation about insurance leverage, lifelong learning, insurance transfers, and corporate insurance ownership.

British Columbia	1 Life Credit
Alberta	1 Life Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit
MFDA	1 Credit for Professional Development
Advocis	1 Financial Management Credit
IIROC	1 Credit for Cycle 9 Professional Development

S04E19 - Planning for a Child with a Disability

Jason flies solo for this episode. He discusses the supports he and his wife have provided for their daughter.

British Columbia	1 Life Credit
Alberta	1 A&S Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit
MFDA	1 Credit for Professional Development
Advocis	1 Financial Management Credit
IIROC	1 Credit for Cycle 9 Professional Development

S04E20 - How Comedy Drove Me to Financial Planning

Financial Planner Kent Tilley joins Jason for a discussion of Kent's move to independence. Kent flips the tables and interviews Jason about financial planning with vulnerable populations.

British Columbia	1 Life Credit
Alberta	1 A&S Credit
Saskatchewan	1 Life Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Financial Planning Credit
MFDA	1 Credit for Professional Development
Advocis	1 Financial Management Credit
IIROC	1 Credit for Cycle 9 Professional Development

Live CE Class 2022

Jan 21, 2022- Who is covered under Group Plans? – (Completed)

Feb 18, 2022 - The Professional Executor* – (Completed)

Mar 18, 2022 - Unconventional Disability Products – (Completed)

Apr 8, 2022 - Understanding RRSPs – (Completed)

May 20, 2022 - Understanding CPP – (Completed)

Jun 17, 2022 - Financial Math using Excel

British Columbia	3.5 Life Credits
Alberta	2.5 Life & 3.5 A&S Credits
Saskatchewan	3.5 Life Credits
Manitoba	3.5 Life and/or A&S Credit
Ontario	3.5 CE Credit
FP Canada	3.5 Financial Planning Credit
Advocis	3.5 Financial Management Credit

Jul 15, 2022 - Self-Insurance in Group Plans

British Columbia	3.5 Life Credits
Alberta	0.0 Life & 3.5 A&S Credits
Saskatchewan	3.5 Life Credits
Manitoba	3.5 Life and/or A&S Credit
Ontario	3.5 CE Credit
FP Canada	3.5 Financial Planning Credit
MFDA	3.5 Credit for Professional Development
Advocis	3.5 Financial Management Credit

Aug 19 ,2022 - Managing Financial Windfalls*

British Columbia	3.5 Life Credits
Alberta	3.5 Life & 1.0 A&S Credits
Saskatchewan	3.5 Life Credits 1.0 Ethics
Manitoba	3.5 Life and/or A&S Credit
Ontario	3.5 CE Credit
FP Canada	2.5 Financial Planning Credit 1.0 Professional Responsibility
Advocis	3.5 Financial Management Credit

Sept 16, 2022 - Living Benefits for Farmers

British Columbia	3.5 Life Credits
Alberta	0.0 Life & 3.5 A&S Credits
Saskatchewan	3.5 Life Credits
Manitoba	3.5 Life and/or A&S Credit
Ontario	3.5 CE Credit
FP Canada	3.5 Financial Planning Credit
MFDA	3.5 Credit for Professional Development
Advocis	3.5 Financial Management Credit

Oct 7, 2022 - LTD in Group Plans

British Columbia	3.5 Life Credits
Alberta	0.0 Life & 3.5 A&S Credits
Saskatchewan	3.5 Life Credits
Manitoba	3.5 Life and/or A&S Credit
Ontario	3.5 CE Credit
FP Canada	3.5 Financial Planning Credit
Advocis	3.5 Financial Management Credit

Nov 18, 2022 - Planning with the HoldCo

British Columbia	3.5 Life Credits
Alberta	3.5 Life & 0.0 A&S Credits
Saskatchewan	3.5 Life Credits
Manitoba	3.5 Life and/or A&S Credit
Ontario	3.5 CE Credit
FP Canada	3.5 Financial Planning Credit
MFDA	3.5 Credit for Professional Development
Advocis	3.5 Financial Management Credit

Dec 16, 2022 - Stress Testing the Financial Plan*

British Columbia	3.5 Life Credits
Alberta	3.5 Life & 0.0 A&S Credits
Saskatchewan	3.5 Life Credits
Manitoba	3.5 Life and/or A&S Credit
Ontario	3.5 CE Credit
FP Canada	2.5 Financial Planning Credit 1.0 Professional Responsibility
Advocis	3.5 Financial Management Credit