



Your Customized CE Solution

Created on February 6, 2020

Prepared for: Name

Company Name





Your Customized CE Solution

Created on February 6, 2020

Your Contact Information

Name: Your Name

Email: youremail@company.ca

Company Name: Your Company

Phone #: 555-987-6543 x21

Location: Your City, Your Province

CE Credits already earned: 8

Currently being audited: No

Licenses & Designations

Life Licenses Held:

Ontario

Next Renewal Date: March 28, 2020

Mutual Fund Licenses Held:

MFDA

Professional Designations Held:

CFP, CLU, & CHS/RHU



CE Solution Preferences

You prefer to earn CE Credits:

1. Online Webcasts
2. On-Demand at Your Convenience

However, you never want to earn your CE Credits:

- At a physical location in a crowd of people

You prefer to schedule your CE Activities on:

Tuesday, Wednesday, Thursday

While you prefer to reserve the days below for business/personal activities:

Monday, Friday, Weekend

You prefer to schedule your CE Activities during the following months:

February

While you prefer not to do anything CE Related during the months below:

April

You are most interested in CE Activities that are in the following categories:

- Professional Responsibility/Ethics
- Insurance
- Investments
- Client Issues
- Legal, Tax & Estate Planning



Your CE Requirements

Life License(s)

Ontario – Financial Services Commission of Ontario (FSCO)

Renewal Date: 2 years from license date

Category	Minimum	Maximum	Carryover	Verifiable	Conditions / Restrictions
Total	30	30	0	yes	

Mutual Fund License(s)

MFDA – Mutual Funds Dealers Association

Renewal Date: **NOTE: MFDA does NOT currently require CE Credits. Although plans to implement have been announced, no implementation dates are scheduled. CE from CE-credits would apply to MFDA CE Requirements when they are announced. The chart below is the CE Requirements outline that has been announced.**

Category	Minimum	Maximum	Carryover	Verifiable	Conditions / Restrictions
Total	32	32	0	Yes	
Professional Development	20	20	0	Yes	
Business Conduct	10	10	0	Yes	
MFDA Compliance	2	2	0	Yes	

Professional Designation(s)

CFP – Certified Financial Planner

Renewal Date: Annually on December 31st

Category	Minimum	Maximum	Carryover	Verifiable	Conditions / Restrictions
First renewal is in the Calendar year following licensing. Example. Earn license in 2019, first renewal is December 31, 2020. No CE Requirements in the year that the Designation was earned.					
Total	25	25	24	Yes	
Financial Planning	10	23	23	Yes	
Professional Responsibility	2	2	0	Yes	
Practice Management	0	5	Excess becomes Financial Planning	Yes	
Product Knowledge	0	5	Excess becomes Financial Planning	Yes	
Giving Back	0	5	0	Yes	



CLU – Certified Life Underwriter

Renewal Date: Annually on December 31st

Category	Minimum	Maximum	Carryover	Verifiable	Conditions / Restrictions
Total	30	30	0	Yes	
IAFE Approved Credits	15	30	0	Yes	
Non-IAFE Approved Credits	0	15	0	Yes	
Ethics	1	1	0	Yes	This credit would also be counted within the above 2 categories

CHS – Certified Health Insurance Specialist (formerly called RHU)

Renewal Date: Annually on December 31st

Category	Minimum	Maximum	Carryover	Verifiable	Conditions / Restrictions
IAFE Approved Credits	10	10	0	Yes	



Your Combined CE Requirements

CE Credits provided by CE-credits.ca

Total CE Credits Required:

22 (30 – 8 Already Earned)

NOTE: if any of the 8 CE Credits already earned were earned in 2019, then you will require another 8 CE Credits in 2020 to fulfil your CLU Requirements, and 3 more for your CFP Requirements. As a result, we recommend taking a total of 31 CE Credits in 2020.

Categories and Breakdown:

To fulfil all CE Requirements you will need:

- 2 Professional Responsibility Credits (CFP)
- 10 Financial Planning Credits (CFP)
- 15 IAFE Approved Credits (CLU)
- All these and other credits can be used for Life License.
- MFDA Currently does not currently require CE Credits.

Licenses and Designations that are Included in this Section:

Name: Ontario Life License, MFDA, CFP, CLU, & CHS/RHU

The recommendation below will provide you will all the CE Credits you require for your 2020 renewals. You must complete at least 22 of the recommended CE Credits by March 28th for your Life License renewal, and the remaining CE Credits can be completed by December 31st.

Any CE Credits earned after March 31st, can be used for your 2022 Ontario Life License Renewal.



Your CE Activities Recommendation

Watch the Live Webcast on March 3rd & 4th, to earn 15 of the CE Credits that you require by March 28th.

CE-Now.ca – CE Credits On-Demand

Every presentation video listed is worth 1 CE Credit each

<p>The Ultimate CLU Bundle 2019 (30 CE Credits) FP Canada Approved - 1 Professional Responsibility - 14 Financial Planning - 5 Practice Management - 5 Product Knowledge 15 IAFE Approved Credits - 15 Non-IAFE Approved Credits</p>
NEW! Professional Responsibility Applied! (2019 Case Studies), Alan Hoffman, CE-credits.ca - 1h:10m - PR
NEW! Lead or Be Left Behind 2019, Robert Gignac, Rich is a State of Mind - 1h:06m - PM - IAFE
NEW! Social Media Marketing: Take the First Step, Barbara Lowe, Assisting You Social - 0:56 - PM
NEW! Future Ready Advisor, Wendy Brookhouse, Black Star Wealth - 0:38 - PM - IAFE
NEW! Beyond Passwords: How to Secure Your Practice, Elias Puurunen, Northern HCI Solutions - 0:58 - PM
A Retirement Income Strategy (Robo, Online & Fee Free Investing), Jason Fuller, Equitable Life - 0h:47m - PK - IAFE
Engaging Executors Crucial to the Greatest Wealth Transfer in History, Mark O'Farrell, CICEA - 1h:00m - FP - IAFE
Get More Conversations by Discussing Long Term Care, Larry Hoover, Why You Marketing - 0h:53m - PM - IAFE
NEW! Kidnap & Ransom Insurance 101, Sophie Strezos-Egnatis, Hunter McCorquodale - 1:00 - FP - IAFE
NEW! Business Waits for Nobody, Richard Morin, You Working With You - 0:56 - PM - IAFE
Prospecting Your Way to Success, Don Xavier, Don Xavier Academy - 0h:55m - PM
Illness Not Attitude (Mental Illness Series), Pete Somers, Equitable Life - 0h:49m - FP
NEW! Underwriting Diabetes, Melanie McCallum, CPP - 0h:39m - PK - IAFE
Are Your Clients Prepared for the Unexpected?, Rick Machtinger, Juggernaut Financial - 0h:53m - PK - IAFE
NEW! Pillar Series: The Foundation of Protection, Jason Allen, La Capitale - 0:53 - PK
NEW! Foresters Sweet Spots, Shawn Hughes, Foresters Financial - 1h:05m - PK
NEW! The Advantage of Holistic Discretionary Planning, Jason Trueman, CPWM - 0:45 - FP
NEW! Use the Listen-Reflect Loop to Maximize Sales, Kira Callahan, Conversation Gym - 0:48 - FP
Empowering You to Focus on What Matters Most, Adam Hussey, Blendable - 1h:02m - FP - IAFE
Special Needs & Disability Estate Planning, Ken Pope, K. Pope Law - 1h:02m - FP
NEW! What Does Long Term Care REALLY Mean?, Karen Henderson, LTCPN - 1:02 - FP



NEW! Not All Books Are Created Equal, Julia Haggerty, Advisor Finance - 0:52 - PM - IAFE
NEW! M&A: A Roadmap to Maximize Value, Afsar Shah, The Personal Coach - 0:48 - PM
NEW! Reverse Mortgage by Equitable Bank, Joe Flor, Equitable Bank - 0:46 - PK
Building a Stronger Investment Portfolio with Equimax Participating Whole Life, Martin Lydon, Equitable Life - 0h:46m - PK
NEW! The Pathology of Cancer, Lorna Mirham, CPP - 0h:46m - FP- IAFE
NEW! Information and Cyber Security, Tom Warren, Net-Patrol International - 0:42 - PM
The Charitable Advantage, David Hutchison, Foresters Financial - 0h:42m - PK - IAFE
Top 10 Ideas to Grow Your Investment Business, Sherry Miller, Empire Life - 0h:44m - PK
NEW! A Dental Benefits Program that Works for Everyone, Angelo Mantzios, Financial Strategies Group - 0h:54m - PK - IAFE

Professional Responsibility / Ethics Presentations
NEW! Character & Professional Relationships: Ethics & Prof Resp, Rod Burylo, Croft Financial - 0:58 - PR

You can also choose any of the presentations listed below for additional learning if you are interested

Investment Presentations
NEW! The Advantage of Holistic Discretionary Planning, Jason Trueman, Cumberland Private Wealth Mgmt - 0h:45m - FP
Attracting & Retaining Assets with CPWM, Jason Trueman, Cumberland Private Wealth Mgmt - 0h:42m - PM
Portfolio Management & Asset Allocation, Jason Trueman, Cumberland Private Wealth Mgmt - 0h:41m - FP - IAFE
A Retirement Income Strategy (Robo, Online & Fee Free Investing), Jason Fuller, Equitable Life - 0h:47m - PK - IAFE
Top 10 Ideas to Grow Your Investment Business, Sherry Miller, Empire Life - 0h:44m - PK
You Have Built Your Retirement Funds... Now What?, Al Feth, Feth Financial Services - 1h:01m - FP
NEW! The Best of Both Worlds: Savings & Investments, Mark Osborne, La Capitale - 0h:44m - PK
The Best of Both Worlds: Savings & Investments, Jennifer Santos, La Capitale - 0h:44m - PK

Insurance Presentations
NEW! The Pathology of Cancer, Lorna Mirham, CPP - 0h:46m - FP- IAFE
Underwriting Cancer, Melanie McCallum, CPP - 0h:39m - PK - IAFE
NEW! Underwriting Diabetes, Melanie McCallum, CPP - 0h:39m - PK - IAFE
NEW! Harnessing Technology Unleashing Potential, Mike Liem, CPP - 0h:45m -PK - IAFE



Grow Your Business with CPP, Mike Liem, CPP - 0h:50m -PK
NEW! Canada's Fastest Growing Market, Melanie McCallum, CPP - 0h:53m - PK
Canada's Fastest Growing Market, Michel Gagne, CPP - 0h:51m - PK
No Family Will Be Left Behind, Mike Liem, CPP - 0h:47m - PK - IAFE
No Family Will Be Left Behind, Michel Gagne, CPP - 0h:57m - PK - IAFE
NEW! Kidnap & Ransom Insurance 101, Sophie Strezos-Egnatis, Hunter McCorquodale - 1h:00m - FP - IAFE
Introduction to Special Risk Products, Sophie Strezos-Egnatis, Hunter McCorquodale - 1h:08m - PK - IAFE
The Charitable Advantage, David Hutchison, Foresters Financial - 0h:42m - PK - IAFE
NEW! Foresters Sweet Spots, Shawn Hughes, Foresters Financial - 1h:05m - PK
For An Even Greater Advantage, Shawn Hughes, Foresters Financial - 1h:00m - PM
Beyond Protection, Shawn Hughes, Foresters Financial - 0h:56m - PK - IAFE
NEW! Are Your Clients Prepared for the Unexpected?, Rick Machtiger, Juggernaut Financial - 0h:53m - PK - IAFE
Building a Stronger Investment Portfolio with Equimax Participating Whole Life, Martin Lydon, Equitable Life - 0h:46m - PK
Medical Underwriting Preparation, Shalimar Alli-Lao, Dynacare - 0h:53m -FP - IAFE
Surviving at All Costs: The Case for Critical Illness Insurance, Mike Amo, Industrial Alliance - 0h:53m - FP
NEW! Pillar Series: The Foundation of Protection, Jason Allen, La Capitale - 0h:53m -PK
NEW! It's All About Salary: D.I. 101, Jason Allen, La Capitale - 0h:51m -PK
NEW! Credit Protection Market, Jason Allen, La Capitale - 0h:46m - PK
Term Plus: A Multi-Purpose Insurance Solution, Barry Rubin, SSQ Financial - 0h:50m - PK - IAFE
A New Conversation with Every Client, Perry Wong, Juggernaut Financial - 0h:57m - PM - IAFE
People Rely on Arbor Memorial & Assurant Life, Nesse Sarmago-Loshusan, Juggernaut Financial - 0h:48m - PK
Taking Simplified Issue to the MAX!, Ayal Alalouf, CPP - 0h:49m - PK - IAFE
Taking Simplified Issue to the MAX!, Melanie McCallum, CPP - 0h:45m - PK - IAFE
Taking Simplified Issue to the MAX!, Mike Liem, CPP - 0h:50m - PK - IAFE

Client Issues Presentations
NEW! Lead or Be Left Behind, Robert Gignac 2019, Rich is a State of Mind - 1h:06m - PM - IAFE
A Peek Inside Your Clients Mind, Robert Gignac, Rich is a State of Mind - 1h:06m - FP - IAFE
NEW! Illness Not Attitude (Mental Illness Series), Pete Somers, Equitable Life - 0h:49m - FP
It's Not About the Nail, Cathy Hiscott, Canada Life - 0h:52m - FP - IAFE
NEW! Use the Listen-Reflect Loop to Maximize Sales, Kira Callahan, Conversation Gym - 0h:48m - FP
Navigating the Emotional Meeting, Kira Callahan, Conversation Gym - 0h:53m - FP - IAFE
Building Relationships with Emotional Intelligence, Matthew Asser, Asser Inc - 1h:05m - FP - IAFE



What Your Client Expects From You, Fortunato Restagno, The Personal Coach - 0h:44m - PM - IAFE
NEW! What Does Long Term Care REALLY Mean?, Karen Henderson, LTCPN - 1h:02m - FP
Aging Well in Today's World, Karen Henderson, LTCPN - 0h:59m - FP - IAFE
Long Term Care Planning: What it is, and Why Should Your Clients Care, Karen Henderson, LTCPN - 1h:06m - FP
Credit Score: More Than Just a Number, Alan Hoffman, CE-credits.ca - 1h:04m - FP - IAFE
Credit Score: An Effective Prospecting Tool, Alan Hoffman, CE-credits.ca - 1h:06m - PM - IAFE
Grey Divorce, Eva Sachs, Institute of Divorce Financial Analysts - 0h:55m - FP - IAFE
6 Mistakes Divorcing Couples Make, Tatiana Terekhova, FairSplit - 0h:57m - FP
Financial Impact of Separation and Divorce, Su Cooke, Divorce Consulting - 0h:57m - FP - IAFE
The Power of Words, Jennifer Koshul, Assumption Life - 0h:41m - FP - IAFE
NEW! Special Needs Planning for People with a Disability, John Dowson, LifeTRUST Planning - 0h:55m - FP
Life Planning for People with Special Needs, John Dowson, LifeTRUST Planning - 0h:59m - FP

Legal, Tax, and Estate Planning Presentations
Engaging Executors Crucial to the Greatest Wealth Transfer in History, Mark O'Farrell, CICEA - 1h:00m - FP - IAFE
Challenging Dynamics for Executors: Boom or Bust for Advisors?, Mark O'Farrell, CICEA - 0h:54m - FP - IAFE
Special Needs & Disability Estate Planning, Ken Pope, K. Pope Law - 1h:02m - FP
Tax & Estate Planning with Cumberland, Meghan Davis, Cumberland Private Wealth Mgmt - 0h:38m - PK
Disability in Estate Planning and Related Tax Issues, Ken Pope, K. Pope Law - 0h:55m - FP
The Nuts & Bolts of Shareholders Agreements, Anton Katz, AMK Law - 0h:49m - FP
Wills and Estate Planning, Paul Taylor, Legado Law - 0h:43m - FP



Your Customized CE Solution

All CE Credits Required: 31

Solution Option 1: Live Webcast + On-Demand

Unlimited CE On-Demand + Live Webcast = \$400 +hst

Earn 15 CE Credits by watching the March 3rd & 4th Live Webcast, and Select 16 CE Credits On-Demand, including the **CLU / Life License 30 CE Credit Bundle**. This option would also allow you to get a head start on your 2022 Renewal at no additional charge!

All CE Credits Required: 31

Solution Option 2: On-Demand Only

Unlimited CE On-Demand = \$300 +hst

Select 31 CE Credits On-Demand, including the **CLU / Life License 30 CE Credit Bundle**. This option would also allow you to get a head start on your 2022 Renewal at no additional charge!

Reduced CE Credits Required: 15

Solution Option 3: On-Demand Bundle Only

Choose a 15 CE Credit Bundle On-Demand for \$250 +hst
