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Financial Training
for **Canadian** Financial Professionals.

Course List.

Extended Version

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learnedly. Course	Price	Hours	IIROC	MFDA	FSRA	AIC	ICBC	ICS	ICM	CSF	CFP/QAFP	CIM/PFP	CFA	CPA	Advocis	LSO	IQPF
COMPLIANCE / BUSINESS CONDUCT																	
Accessibility: General Requirements	\$25	1	1	1	1		1	1	1		1	1	1	1	1	1	
AML 2024 (new!)	\$50	2	2	2	2	2	2	2	2		2	2	2	2	2	2	
AML: Financial Entities (Fr)	\$50	1.5	1.5	1.5	1	2	1	1	2	1	1.5	1.5	1.5	1.5	1.5	1.5	
AML: Life Insurance (Fr)	\$50	1.5	1.5	1.5	1	2	1	1	2	1	1.5	1.5	1.5	1.5	1.5	1.5	
AML: Real Estate (Fr)	\$50	1.5	1.5	1.5	1	2	1	1	2	1	1.5	1.5	1.5	1.5	1.5	1.5	
AML: Securities Dealers (Fr)	\$50	1.5	1.5	1.5	1	2	1	1	2	1	1.5	1.5	1.5	1.5	1.5	1.5	
Are Your Apps Spying On You?	\$25	1	1	1	1	1	1	1	1		1	1	1	1	1	1	
CFR Part I: Conflicts of Interest (Fr)	\$50	1.5	1.5	1.5	1.5	1	1.5	1.5	1.5	1	1.5	1.5	1.5	1.5	1.5	1.5	
CFR Part II: KYC, KYP, SD (IIROC) (Fr)	\$50	1.5	1.5	1.5	1.5	1	1.5	1.5	1.5	1	1.5	1.5	1.5	1.5	1.5	1.5	1
CFR Part II: KYC, KYP, SD (MFDA) (Fr)	\$50	1.5	1.5	1.5	1.5	1	1.5	1.5	1.5	1	1.5	1.5	1.5	1.5	1.5	1.5	1
CFR Part II: KYC, KYP, SD (PM/EMD) (Fr)	\$50	1.5	1.5	1.5	1.5	1	1.5	1.5	1.5	1	1.5	1.5	1.5	1.5	1.5	1.5	1
CFR Part III: RA, RDI, MC, OAs and Pols (Fr)	\$50	1.5	1.5	1.5	1.5		1.5	1.5	1.5		1.5	1.5	1.5	1.5	1.5	1.5	
CFR Part IV: Vulnerable Clients (Fr)	\$50	0.5	0.5	0.5	0.5		0.5	0.5	0.5		0.5	0.5	0.5	0.5	0.5	0.5	
Client Focused Reforms (IIROC) (Fr)	\$100	4	4	4	4	4	4	4	4	2	4	4	4	4	4	4	
Client Focused Reforms (MFDA) (Fr)	\$100	4	4	4	4	4	4	4	4	2	4	4	4	4	4	4	
Client Focused Reforms (PM/EMD) (Fr)	\$100	4	4	4	4	4	4	4	4	2	4	4	4	4	4	4	
Client Relationship Model Phase 2 (CRM)	\$25	1		1	1	1	1	1	1		1	1	1	1	1	1	
Cyber Security Awareness Training	\$50	2	2	2	2	2	2	2	2		2	2	2	2	2	2	
ESG: Investment Fund Disclosure	\$50	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
Ethics 2023	\$50	2.5	2.5	2	2	2	2.5	2.5	2.5		2.5	2.5	2.5	2.5	2.5	2.5	
Financial Scandal	\$100	5	5	5	5	5	5	5	5		5	5	5	5	5	5	
GameStop, FTX, Data and "Fin-fluencers"	\$100	5	5	5	5	5	5	5	5		5	5	5	5	5	5	
Insider Trading & Tipping	\$50	1	1	1	1	1	1	1			1	1	1	1	1	1	
Privacy Training (Updated!)	\$50	1	1	1	1	1	1	1	1		1	1	1	1	1	1	
Vulnerable Clients	\$50	2	2	2	2	2	2	2	2		2	2	2	2	2	2	
COMPLIANCE / BUSINESS CONDUCT - CCO EDITION																	
CCO Ed: CFR Part I: Conflicts of Interest	\$25	2	2	2	2		2	2	2		2	2	2	2	2	2	
CCO Ed: CFR Part II: KYC, KYP, SD	\$25	2	2	2	2		2	2	2		2	2	2	2	2	2	
CCO Ed: CFR Part III: RA, RDI, MC, OAs, POIs & Vulnerable Clients	\$25	2.5	2.5	2.5	2.5		2.5	2.5	2.5		2.5	2.5	2.5	2.5	2.5	2.5	
CCO Ed: Crypto Asset Trading Platforms: PRUs	\$25	1			1		1	1	1		1	1	1	1	1	1	
CCO Ed: Disclosure Standards	\$25	1			1		1	1	1		1	1	1	1	1	1	
CCO Ed: NI 33-109 Amendments	\$25	1			1		1	1	1		1	1	1	1	1	1	

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FOUNDATIONS																	
Becoming a Mutual Fund Representative	\$25	0.5			0.5		0.5	0.5									
Behavioural Finance	\$25	1			1		1	1									
Budgeting and Debt Management	\$25	1			1		1	1									
Canada's Tax System	\$25	1			1		1	1									
Client Communication and Financial Planning	\$25	1			1		1	1									
Credit Fundamentals	\$25	1			1		1	1									
Creditor Insurance	\$25	1			1		1	1									
Equity Investments	\$25	1			1		1	1									
Ethics and Standards of Conduct	\$25	1			1		1	1									
Financial Planning	\$25	1			1		1	1									
Financial Ratios	\$25	1			1		1	1									
Financial Statements	\$25	1			1		1	1									
Fixed Income Investments	\$25	1			1		1	1									
Intro to Canada's Financial Services Industry	\$25	1			1		1	1									
Intro to Economics	\$25	1			1		1	1									
Investment Portfolios: Introduction	\$25	1			1		1	1									
Mutual Fund Rules and Regulations	\$25	1			1		1	1									
Mutual Funds: An Introduction	\$25	1			1		1	1									
NaviPlan: Getting Started	\$25	1		1	1		1	1	1		1	1	1	1	1	1	
Pensions and Tax Deferral Plans	\$25	1			1		1	1									
Understanding Mortgages	\$25	1			1		1	1									
Working Together: The Code and the AODA	\$25	1			1		1	1									
SKILLS DEVELOPMENT: CUSTOMER SUCCESS & SERVICE																	
Cultural Sensitivity in Customer Service	\$25	1			1		1	1	1		1	1	1	1	1		
Customer Service Fundamentals	\$25	1			1		1	1	1		1	1	1	1	1		
Customer Service Skills	\$25	1			1		1	1	1		1	1	1	1	1		
Do You Have These Four Essential Customer Service Skills?	\$25	1			1		1	1	1		1	1	1	1	1		
Handling Difficult Customer Service Scenarios	\$25	1			1		1	1	1		1	1	1	1	1		
Managing a Successful Contact Center	\$25	1			1		1	1	1		1	1	1	1	1		
Managing a Customer Service Team (new!)	\$25	1			1		1	1	1		1	1	1	1	1		
Optimizing Customer Communications Across Channels	\$25	1			1		1	1	1		1	1	1	1	1		
Overcoming Procrastination	\$25	1			1		1	1	1		1	1	1	1	1		
Working with Upset Customers	\$25	1			1		1	1	1		1	1	1	1	1		

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SKILLS DEVELOPMENT: COMPLIANCE																	
How to Avoid a Conflict of Interest	\$25	1			1		1	1	1		1	1	1	1	1		
Sexual Harassment Prevention Training	\$25	1			1		1	1	1		1	1	1	1	1		
SKILLS DEVELOPMENT: CYBER SECURITY	\$25	1			1		1	1	1		1	1	1	1	1		
How to Protect Your Data	\$25	1			1		1	1	1		1	1	1	1	1		
How to Protect Yourself Against Phishing	\$25	1			1		1	1	1		1	1	1	1	1		
Online Security Fundamentals	\$25	1			1		1	1	1		1	1	1	1	1		
What is Social Engineering	\$25	1			1		1	1	1		1	1	1	1	1		
SKILLS DEVELOPMENT: DIVERSITY & INCLUSION																	
Creating Social Change: A Guide for Everyday Citizens	\$25	1			1		1	1	1		1	1	1	1	1		
Cultivating Diversity, Inclusion, and Belonging at Work	\$25	1			1		1	1	1		1	1	1	1	1		
Diversity Basics I: Foundations	\$25	1			1		1	1	1		1	1	1	1	1		
Diversity Basics II: Taking Actions	\$25	1			1		1	1	1		1	1	1	1	1		
Having Uncomfortable Conversations About Sensitive Issues	\$25	1			1		1	1	1		1	1	1	1	1		
How to Avoid Bias in Talent Recruiting and Retention	\$25	1			1		1	1	1		1	1	1	1	1		
How to Be an Ally for Diversity and Inclusion	\$25	1			1		1	1	1		1	1	1	1	1		
How to Recognize and Overcome Bias	\$25	1			1		1	1	1		1	1	1	1	1		
Uncovering Hidden Prejudice Shaping What We See, Think, & Do	\$25	1			1		1	1	1		1	1	1	1	1		
Working Across Cultures	\$25	1			1		1	1	1		1	1	1	1	1		
SKILLS DEVELOPMENT: HEALTH & WELLNESS																	
7 Go-to Strategies to Tame Stress (new!)	\$25	1			1		1	1	1		1	1	1	1	1		
5-Day Challenge to Improve Your Mental Health (new!)	\$25	1			1		1	1	1		1	1	1	1	1		
Alex Hutchinson on Endurance	\$25	1			1		1	1	1		1	1	1	1	1		
Beating Burnout: Spot the Symptoms and Take Action (new!)	\$25	1			1		1	1	1		1	1	1	1	1		
Dealing With Stress, Pressure, and Burnout (new!)	\$25	1			1		1	1	1		1	1	1	1	1		
Good Stress - Embracing Eustress to Improve Your Life	\$25	1			1		1	1	1		1	1	1	1	1		
Harnessing Emotions in the Workplace	\$25	1			1		1	1	1		1	1	1	1	1		
Harnessing the Chatter in Our Minds with Dr. Ethan Kross	\$25	1			1		1	1	1		1	1	1	1	1		
How to Create an Employee Wellness Program	\$25	1			1		1	1	1		1	1	1	1	1		
Imposter Syndrome: What it is and How to Overcome it	\$25	1			1		1	1	1		1	1	1	1	1		
Reenvisioning the Aging Process with Daniel Levitin	\$25	1			1		1	1	1		1	1	1	1	1		
Retirement Planning for Every Stage of Life	\$25	1			1		1	1	1		1	1	1	1	1		
The Basics of Managing Stress	\$25	1			1		1	1	1		1	1	1	1	1		
The Healing Power of Human Connection	\$25	1			1		1	1	1		1	1	1	1	1		
The Hidden Benefits of Delusion with Shankar Vendantam	\$25	1			1		1	1	1		1	1	1	1	1		

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SKILLS DEVELOPMENT: HUMAN RESOURCES																	
7 Types of Interviews and When to Use Them	\$25	1			1		1	1	1		1	1		1	1		
A Guide to Workplace Integrity	\$25	1			1		1	1	1		1	1		1	1		
Dealing with a Problem at Work: When and How to Involve HR	\$25	1			1		1	1	1		1	1		1	1		
Doing the Right Thing: A Guide to Good Business Ethics	\$25	1			1		1	1	1		1	1		1	1		
Driving Your Career	\$25	1			1		1	1	1		1	1		1	1		
Getting Started In Human Resources	\$25	1			1		1	1	1		1	1		1	1		
How to Attract and Retain Top Talent	\$25	1			1		1	1	1		1	1		1	1		
How to Conduct an Effective Job Interview	\$25	1			1		1	1	1		1	1		1	1		
Sexual Harassment Training for Employees and Managers	\$25	1			1		1	1	1		1	1		1	1		
SKILLS DEVELOPMENT: LEADERSHIP																	
5 Leadership Styles to Influence a Team	\$25	1			1		1	1	1		1	1		1	1		
A Blueprint for Effective Workplace Leadership	\$25	1			1		1	1	1		1	1		1	1		
A Guide to Effective Meetings	\$25	1			1		1	1	1		1	1		1	1		
A Guide to Managing Remote Teams	\$25	1			1		1	1	1		1	1		1	1		
A Guide to Mentoring Others	\$25	1			1		1	1	1		1	1		1	1		
A Guide to Navigating Team Dynamics	\$25	1			1		1	1	1		1	1		1	1		
A Manager's Guide to Resolving Team Conflict	\$25	1			1		1	1	1		1	1		1	1		
Becoming the Boss: A Guide for New Managers	\$25	1			1		1	1	1		1	1		1	1		
Create an Envable Team Culture	\$25	1			1		1	1	1		1	1		1	1		
Crisis Management	\$25	1			1		1	1	1		1	1		1	1		
Develop a Thriving Team	\$25	1			1		1	1	1		1	1		1	1		
Effective Feedback Strategies	\$25	1			1		1	1	1		1	1		1	1		
Fostering Fearless and Resilient Teams with Mollie West Duffy	\$25	1			1		1	1	1		1	1		1	1		
How ao Have Difficult Conversations	\$25	1			1		1	1	1		1	1		1	1		
How Great Leaders Solve Problems	\$25	1			1		1	1	1		1	1		1	1		
Introduction to Team Management	\$25	1			1		1	1	1		1	1		1	1		
Leading Through Change (new!)	\$25	1			1		1	1	1		1	1		1	1		
Leading Through Difficult Times	\$25	1			1		1	1	1		1	1		1	1		
Leading with Emotional Intelligence	\$25	1			1		1	1	1		1	1		1	1		
Letting an Employee Go Gracefully	\$25	1			1		1	1	1		1	1		1	1		
Motivating Your Team	\$25	1			1		1	1	1		1	1		1	1		
Nurturing Ideas that Win Wars, Cure Diseases & Transform	\$25	1			1		1	1	1		1	1		1	1		

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SKILLS DEVELOPMENT: LEADERSHIP																	
Overcoming Common Challenges of Remote Managers	\$25	1			1		1	1	1		1	1	1	1	1		
Performance Management	\$25	1			1		1	1	1		1	1	1	1	1		
Redefining Power in a Hyper-Connected World	\$25	1			1		1	1	1		1	1	1	1	1		
Resolving Conflict	\$25	1			1		1	1	1		1	1	1	1	1		
The Four Stages of Team Development	\$25	1			1		1	1	1		1	1	1	1	1		
The Secrets of Highly Successful Groups	\$25	1			1		1	1	1		1	1	1	1	1		
The Secrets of Skilled Delegation	\$25	1			1		1	1	1		1	1	1	1	1		
The Secrets to Career Success with Elena Bothello	\$25	1			1		1	1	1		1	1	1	1	1		
Transitioning to Remote Work	\$25	1			1		1	1	1		1	1	1	1	1		
What Debate Teaches Us About Listening to Each Other (new!)	\$25	1			1		1	1	1		1	1	1	1	1		
SKILLS DEVELOPMENT: PERSONAL DEVELOPMENT																	
4 Personality Types that Suffer from Chronic Lateness	\$25	1			1		1	1	1		1	1	1	1	1		
4 Ways to Add Value and Earn a Raise	\$25	1			1		1	1	1		1	1	1	1	1		
5 Career Roadblocks and How to Overcome Them	\$25	1			1		1	1	1		1	1	1	1	1		
7 and a Half Lessons About the Brain with Dr. Lisa Feldman Barrett	\$25	1			1		1	1	1		1	1	1	1	1		
A Hopeful History of Humankind with Rutger Bergman	\$25	1			1		1	1	1		1	1	1	1	1		
Assessing Your Strengths, Interests and Values	\$25	1			1		1	1	1		1	1	1	1	1		
Being Unapologetically Ambitious with Shelley Archambeau	\$25	1			1		1	1	1		1	1	1	1	1		
Daniel Pink on the Science of Perfect Timing	\$25	1			1		1	1	1		1	1	1	1	1		
David Epstein on Why Generalists Triumph in a Specialized World	\$25	1			1		1	1	1		1	1	1	1	1		
Feeling Unmotivated? Tips to Increase Motivation	\$25	1			1		1	1	1		1	1	1	1	1		
Finding Meaning and Pleasure Through Suffering with Paul Bloom	\$25	1			1		1	1	1		1	1	1	1	1		
Getting it Done with Ayelet Fishbach	\$25	1			1		1	1	1		1	1	1	1	1		
Good Habits, Bad Habits with Wendy Wood	\$25	1			1		1	1	1		1	1	1	1	1		
How to Change for the Better with Katy Milkman	\$25	1			1		1	1	1		1	1	1	1	1		
How to Land Your Dream Job	\$25	1			1		1	1	1		1	1	1	1	1		
How to Overcome Your Fear of Failure	\$25	1			1		1	1	1		1	1	1	1	1		
Making Numbers Count with Chip Heath	\$25	1			1		1	1	1		1	1	1	1	1		
Playing Well With Others (new!)	\$25	1			1		1	1	1		1	1	1	1	1		
Scheduling 101: How to Prioritize Tasks and Avoid Procrastination	\$25	1			1		1	1	1		1	1	1	1	1		
Setting Goals That Actually Work	\$25	1			1		1	1	1		1	1	1	1	1		
The Realities of Artificial Intelligence	\$25	1			1		1	1	1		1	1	1	1	1		
Time Management Essentials	\$25	1			1		1	1	1		1	1	1	1	1		

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SKILLS DEVELOPMENT: PERSONAL DEVELOPMENT																	
Time to Find a New Job?	\$25	1			1		1	1	1		1	1	1	1	1	1	
Unsolved Mystery: The Case of Amelia Earhart	\$25	1			1		1	1	1		1	1	1	1	1	1	
What Hunter Gatherer Societies Teach Us About Work & Wellbeing	\$25	1			1		1	1	1		1	1	1	1	1	1	
Why We Get Trapped in Conflict and How to Get Out	\$25	1			1		1	1	1		1	1	1	1	1	1	
SKILLS DEVELOPMENT: PROFESSIONAL SKILLS																	
A Step-by-Step Guide to Problem Solving	\$25	1			1		1	1	1		1	1	1	1	1	1	
Business Writing Fundamentals	\$25	1			1		1	1	1		1	1	1	1	1	1	
Change Management for Project Managers	\$25	1			1		1	1	1		1	1	1	1	1	1	
Coming Back from a Big Workplace Mistake	\$25	1			1		1	1	1		1	1	1	1	1	1	
Common Workplace Challenges and How to Handle Them	\$25	1			1		1	1	1		1	1	1	1	1	1	
Communication Fundamentals	\$25	1			1		1	1	1		1	1	1	1	1	1	
Communication Strategies for Project Managers	\$25	1			1		1	1	1		1	1	1	1	1	1	
Creating and Delivering Business Presentations	\$25	1			1		1	1	1		1	1	1	1	1	1	
Developing and Maintaining a Professional Network	\$25	1			1		1	1	1		1	1	1	1	1	1	
Do's and Don'ts After Losing Your Job	\$25	1			1		1	1	1		1	1	1	1	1	1	
Farsighted Decisions with Steven Johnson	\$25	1			1		1	1	1		1	1	1	1	1	1	
Getting Started with Project Management	\$25	1			1		1	1	1		1	1	1	1	1	1	
Giving Effective Feedback	\$25	1			1		1	1	1		1	1	1	1	1	1	
Guide to Negotiations and Persuasion	\$25	1			1		1	1	1		1	1	1	1	1	1	
How to Build Better Relationships with Your Boss Aad Coworkers	\$25	1			1		1	1	1		1	1	1	1	1	1	
How to Improve Your Focus at Work	\$25	1			1		1	1	1		1	1	1	1	1	1	
How to Work Effectively with Different Communication Styles	\$25	1			1		1	1	1		1	1	1	1	1	1	
Improve Your Business Writing Skills	\$25	1			1		1	1	1		1	1	1	1	1	1	
Improving Your Project Management Skills	\$25	1			1		1	1	1		1	1	1	1	1	1	
Mastering Project Management Frameworks	\$25	1			1		1	1	1		1	1	1	1	1	1	
Mastering the Art of Verbal Communication	\$25	1			1		1	1	1		1	1	1	1	1	1	
Poker Decision Making and Human Psychology	\$25	1			1		1	1	1		1	1	1	1	1	1	
Problem Solving Fundamentals	\$25	1			1		1	1	1		1	1	1	1	1	1	
Project Management Scheduling	\$25	1			1		1	1	1		1	1	1	1	1	1	
Receiving and Seeking Feedback	\$25	1			1		1	1	1		1	1	1	1	1	1	
Resolving Conflict with Coworkers	\$25	1			1		1	1	1		1	1	1	1	1	1	
Secrets to Successful Reporting for Project Managers	\$25	1			1		1	1	1		1	1	1	1	1	1	
Supercharging Your Career with Help of a Mentor	\$25	1			1		1	1	1		1	1	1	1	1	1	

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SKILLS DEVELOPMENT: PROFESSIONAL SKILLS																	
Take Control of Your Future Career Development	\$25	1			1		1	1	1		1	1	1	1	1	1	
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ICBC - Insurance Council of British Columbia

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ICM - Insurance Council of Manitoba

CSF - Chambre de la sécurité financière

CFP/QAFP - Certified Financial Planner / Qualified Associate Financial Planner

CIM/PFP - Chartered Investment Manager / Professional Financial Planner

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