YOUR ADVISOR'S CREDENTIALS

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Do you know exactly how much money it is going to take for you to retire comfortably **and to remain comfortably retired**?

CFP® | Certified Financial Planner

The Certified Financial Planner (CFP) designation is an internationally recognized standard for financial planning. It is granted by the Financial Planners Standards Council (FPSC). Advocis is one of the FPSC's founding member organizations offering courses leading to the CFP designation. An advisor with a CFP may help you with personal financial planning and offer advice on investment products and strategies.

CLU® | Chartered Life Underwriter

The Chartered Life Underwriter (CLU) is a professional financial advisor specializing in developing effective solutions for individuals, business owners and professionals in the areas of income replacement, risk management, estate planning, and wealth transfer. For more than 80 years, the CLU designation has been widely recognized as a mark of excellence in the industry.

CH.F.C. | Chartered Financial Consultant

A Chartered Financial Consultant (CH.F.C.) is a financial advisor with advanced knowledge in wealth accumulation and retirement planning. An advisor with a CH.F.C. is an expert in retirement planning and capital accumulation strategies.

TEP | Trust and Estate Practitioner

TEP is a multi-disciplinary organization with the most experienced and senior practitioners in the field, including: lawyers, accountants, financial planners, insurance advisors and trust professionals. They provide domestic and international advice on trust and estates, including planning, administration and related taxes. The TEP designation is the hallmark for trust & estate practitioners.

FMA | Financial Management Advisor Designation

FMA holders are recognized as experts in serving the needs of today's wealthier and more sophisticated clients, with a focus on advanced Wealth Management Techniques and Portfolio Construction. This designation gives advisors the knowledge and expertise needed to handle complex wealth management issues and the ability to counsel high net worth clients. Advisors gain an enhanced understanding of the wealth management process, including estate and tax planning. As an FMA, there is an expectation of Truth, Integrity, Justice, Fairness and Honesty when dealing with clients and professional peers.

FCSI® | Fellows of CSI

Every industry has leaders - people who go above and beyond to set new standards that others strive towards. In Canadian financial services, these people are the Fellows of CSI (FCSI®). The FCSI is the highest honour and most senior credential in Canadian financial services. It is reserved solely for an elite group of experienced financial services professionals that meet the highest standards for advanced education, ethical conduct, industry experience and peer endorsement.

CPCA® | Certified Professional Consultants on Aging

Certified Professional Consultants on Aging (CPCA)s® are professionals who have taken a comprehensive 24 module course about the health, social, and financial aspects of aging. Dr. John Crawford, VP Education, and a retired professor of Gerontology refers to the curriculum as "Gerontology 101 for business - taking cutting edge research and translating this into best practice for professionals serving the 50+.

CEA | Certified Executor Advisor Designation

The CEA is designed to provide advisors with a practical level of knowledge covering all the issues executors may face in the course of their duties. It is the first and only executor-facing designation in Canada. Advisors learn how to engage with executors; the most trusted and influential people, with legal responsibilities for effective estate settlements.