

TRAINING PLAN

Please complete this training plan and list the topics and sub-topics addressed along with the time allocated to each one as well as the objectives in line with the subject. You may also attach a training plan as long as it includes all the information required below.

Provider

Title of the CE activity

General objective

At the end of this CE activity, the participant will be able to...

TRAINING PLAN (CONTINUED)

SPECIFIC OBJECTIVES <i>Describes what the participant will be able to do at the end of the CE activity. Includes an action verb describing observable behaviour</i> MANDATORY – Minimum of 2 specific objectives	ELEMENTS OF CONTENT <i>Subjects covered in line with each specific objective</i>	LEARNING STRATEGY AND ACTIVITY <i>Classroom: oral presentation, discussion, workshop, case study, exercises, etc. Remote: lecture, video, quiz with feedback, interaction with the conference speaker, etc.</i>	LEARNING MATERIAL <i>PowerPoint, textbook, tools, workbook, video, etc.</i>	DURATION <i>Specify for each element of content</i>	SUBJECTS* (PLEASE USE THE DROP-DOWN MENU TO SELECT THE ABBREVIATION CORRESPONDING TO EACH ELEMENT OF CONTENT)

***List and abbreviations of subjects:**

CSF : Chambre de la sécurité financière

GS: General subjects

CO: Compliance with standards, ethics, or business conduct

IP: Insurance of persons

GIP: Group insurance of persons

MF: Mutual funds

SP: Scholarship plans

IQPF : Institut québécois de planification financière

SC: Compliance with standards, ethics, and business conduct

SC-FP: Compliance with standards, ethics, and business conduct related directly to financial planning

SFPA: Legal aspects, insurance, finance, taxation, investments, retirements, and estate planning

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