



Chambre de la
Sécurité
Financière

Application for equivalency for the *Concepts in insurance of persons* course

REGISTRATION FORM

I wish to register for the professional development equivalency exam for the *Concepts in insurance of persons* course. I have been informed that the passing grade is 60 %, that no repeat exam is permitted and that the Chambre de la sécurité financière does not provide the answers to exam questions if I fail.

Signed at _____ this ____ day of _____ 200__

Signature: _____

I wish to register for the exam only (duration 2 hours): \$180 (including taxes).

I wish to register for the exam and receive the exam preparation book: \$ 301 (including taxes).

N.B. All documents will be sent to your address registered in the Autorité des marchés financiers system.

Total: _____ \$ (including taxes) **N.B. No reimbursements**

Last name: _____ First name: _____ Certificate no. (mandatory): _____

Payment method: **(payable to the order of Chambre de la sécurité financière)**

Cheque enclosed

Visa

Master Card

Card number: _____ / _____ / _____ / _____ Expiry date: _____ / _____

Signature: _____

Send to:

M^{me} Anne-Marie Blais, Professional Development Technician
Chambre de la sécurité financière
300, rue Léo-Pariseau, 26^e étage
Montréal (Québec) H2X 4B8

Telephone: 1 800 361-9989 or 514 282-5777

Fax: 514 282-3418

Professional development program leading to the professional titles of Registered Life Underwriter and Chartered Life Underwriter

EQUIVALENCY EXAM FOR THE *CONCEPTS IN INSURANCE OF PERSONS* COURSE

Under the provisions of Division 3 of its regulation governing the titles of Registered Life Underwriter and Chartered Life Underwriter, the Chambre may accord equivalencies to a representative who demonstrates that he has attained a level of knowledge equivalent to that of a person who has taken the course, and who passes the exam for which an exemption has been applied for.

An equivalency exam is now available for the *Concepts in insurance of persons* course. This course, offered by the Chambre, is compulsory for the professional title R.L.U. or C.L.U.

Any representative who earns a passing grade of 60 % on the equivalency exam will be exempted from taking the course. Should this representative meet the additional requirements of the Chambre in the regulation governing titles (pass the other required courses), he may apply for the title R.L.U. or C.L.U. Should he fail the equivalency exam, the representative must take the course over, as it is not possible to repeat the exam. In addition, the Chambre does not release answers in order to protect its question bank.

The equivalency exam will cover all aspects of the course:

- ♦ Mission and services of the Chambre
- ♦ Role of the advisor
- ♦ Risk management
- ♦ Financial mathematics
- ♦ Individual taxation
- ♦ Inflation
- ♦ Civil Code and its applications in insurance of persons
- ♦ Legal aspects
- ♦ Benefit programs
- ♦ Financial products
- ♦ Financial needs analysis

TARGET CLIENTELE

This equivalency is for those who hold a certificate in insurance of persons or in group insurance. If you have completed (or will shortly complete) the professional development programs offered by universities in insurance and financial intervention or in financial planning, this offer should be of special interest to you.

If you are enrolled in one of these programs and **you have passed the courses covering the following material:**

- ♦ economy
- ♦ legal aspects
- ♦ accounting
- ♦ taxation
- ♦ financial management
- ♦ investments
- ♦ insurance and pensions

by passing the equivalency exam you become eligible for the title of Registered Life Underwriter.

If you obtained your title of financial planner after taking the financial planning certificate course and you are a financial security advisor, by passing the equivalency exam you become eligible for the title of Registered Life Underwriter.

ARE YOU INTERESTED?

Exam fee	\$ 180 taxes included
Duration of exam	2 hours
Course book (not mandatory)	\$ 121 taxes included

**N.B. Use of the course book or personal notes is not allowed during the exam.
You will need a calculator to take this exam.**