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Financial Training
for **Canadian** Financial Professionals.

Course List.

Extended Version

learnedly.com



learnedly. Course	Price	Hours	IIROC	MFDA	FSRA	AIC	ICBC	ICS	ICM	CSF	CFP/QAFP	CIM/PFP	CFA	CPA	Advocis	LSO
COMPLIANCE / BUSINESS CONDUCT																
Accessibility: General Requirements	\$25	1	1	1	1		1	1	1		1	1	1	1	1	1
Anti-Money Laundering (AML)	\$50	2	2	2	2	2	2	2	2		2	2	2	2	2	2
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	\$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, and Suitability	\$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 III: RA, RDI, MC, OAs and Pols	\$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	\$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	\$100	4	4	4	4	4	4	4	4	1	4	4	4	4	4	4
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
Ethics 2024	\$50	2	2	2	2	2	2	2	2		2	2	2	2	2	2
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	\$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: Client Focused Reforms	\$100	4	4	4	4		4	4	4		4	4	4	4	4	4
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
PROFESSIONAL DEVELOPMENT																
Canada's Top Wealth Advisors	\$100	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4
Diversity, Equity and Inclusion	\$100	5	5	5	5	5	5	5	5		5	5	5	5	5	5
Financial History	\$100	5	5	5	5	5	5	5	5		5	5	5	5	5	5
Health and Wellbeing	\$100	5	5	5	5	5	5	5	5		5	5	5	5	5	5
Leadership	\$100	5	5	5	5	5	5	5	5		5	5	5	5	5	5

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LICENSING																
90-Day CIRO Advisor Training (IIROC)	\$300	60	30	30												
90-Day CIRO Advisor Training (MFDA)	\$300	60	30	30												
ETF Proficiency Course	\$160	2	2	2	2	2	2	2	2		2	2	2	2	2	2
LLQP Accident & Sickness (Common Law)*	\$250	20	20	20	20	20	20	20	20		20	20	20	20	20	20
LLQP Full Life (Canada)*	\$350	20	20	20	20	20	20	20	20		20	20	20	20	20	20
LLQP Full Life (Common Law)*	\$350	20	20	20	20	20	20	20	20		20	20	20	20	20	20
LLQP Upgrade from A&S to Life Agent*	\$200	20	20	20	20	20	20	20	20		20	20	20	20	20	20
EXAM PREP																
Canadian Securities Course ™ Exam Prep	\$150	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
CIFC ™ Exam Prep	\$100	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
IFC Exam Prep	\$100	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
LLQP Exam Prep: Accident & Sickness	\$100	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
LLQP Exam Prep: Full Life	\$200	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
REFERENCE																
2024 Rates and Reference	Sub. Only	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Financial Calculators	Sub. Only	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Financial Formulas	Sub. Only	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Financial Glossary	Sub. Only	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
FOUNDATIONS																
Becoming a Mutual Fund Representative	\$25	0.5														
Behavioural Finance	\$25	1			1		1	1	1		1FP	1PD				
Budgeting and Debt Management	\$25	1			1		1	1	1		1FP	1PD				
Canada's Tax System	\$25	1			1		1	1	1		1FP	1PD				
Client Communication and Financial Planning	\$25	1			1		1	1	1		1FP	1PD				
Credit Fundamentals	\$25	1			1		1	1	1		1FP	1PD				
Creditor Insurance	\$25	1			1		1	1	1		1FP	1PD				

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FOUNDATIONS																
Equity Investments	\$25	1			1		1	1	1		1FP	1PD				
Ethics and Standards of Conduct	\$25	1			1		1	1	1		1FP	1PD				
Financial Planning	\$25	1			1		1	1	1		1FP	1PD				
Financial Ratios	\$25	1			1		1	1	1		1FP	1PD				
Financial Statements	\$25	1			1		1	1	1		1FP	1PD				
Fixed Income Investments	\$25	1			1		1	1	1		1FP	1PD				
Intro to Canada's Financial Services Industry	\$25	1			1		1	1	1							
Intro to Economics	\$25	1														
Investment Portfolios: Introduction	\$25	1			1		1	1	1		1FP	1PD				
Mutual Fund Rules and Regulations	\$25	1			1		1	1	1		1FP	1PD				
Mutual Funds: An Introduction	\$25	1			1		1	1	1		1FP					
Pensions and Tax Deferral Plans	\$25	1			1		1	1	1		1FP	1PD				
Understanding Mortgages	\$25	1			1		1	1	1		1FP	1PD				
Working Together: The Code and the AODA	\$25	1			1		1	1	1		1FP	1PD				
SKILLS DEVELOPMENT: CUSTOMER SUCCESS & SERVICE																
Cultural Sensitivity in Customer Service	\$25	1			1		1	1	1		1	1	1	1	1	1
Customer Communication Essentials	\$25	1			1		1	1	1		1	1	1	1	1	1
Customer Service Fundamentals	\$25	1			1		1	1	1		1	1	1	1	1	1
Customer Service Skills	\$25	1			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	1
Handling Difficult Customer Service Scenarios	\$25	1			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	1
Managing a Customer Service Team	\$25	1			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	1
Overcoming Procrastination	\$25	1			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	1
SKILLS DEVELOPMENT: COMPLIANCE																
How to Avoid a Conflict of Interest	\$25	1			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	1
SKILLS DEVELOPMENT: CYBER SECURITY																
How to Protect Your Data	\$25	1			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	1

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SKILLS DEVELOPMENT: CYBER SECURITY																
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																
Beyond Pride: Year-Round Action (new!)	\$25	1			1		1	1	1		1	1	1	1	1	
Black History Month	\$25	1			1		1	1	1		1	1	1	1	1	
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	
Power and Pride: The Origins of Pride Month (new!)	\$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	\$25	1			1		1	1	1		1	1	1	1	1	
5-Day Challenge to Improve Your Mental Health	\$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	\$25	1			1		1	1	1		1	1	1	1	1	
Coping with Workplace Change	\$25	1			1		1	1	1		1	1	1	1	1	
Dealing With Stress, Pressure, and Burnout	\$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	
6 Tips for Successful Peer-to-Peer Training	\$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 Empathy at Work	\$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 Guide to Workplace Professionalism	\$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	
Change Management Fundamentals	\$25	1			1		1	1	1		1	1		1	1	
Change Management Models: Advanced Application (new!)	\$25	1			1		1	1	1		1	1		1	1	
Change Management Models: Understanding the Basics (new!)	\$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	
Developing a Growth Mindset (new!)	\$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	

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SKILLS DEVELOPMENT: LEADERSHIP																
Introduction to Team Management	\$25	1			1		1	1	1		1	1		1	1	
Leading Through Change	\$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	
Overcoming Common Challenges of Remote Managers	\$25	1			1		1	1	1		1	1	1	1	1	1
Performance Management	\$25	1			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	1
Resolving Conflict	\$25	1			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	1
The Secrets of Highly Successful Groups	\$25	1			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	1
The Secrets to Career Success with Elena Bothello	\$25	1			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	1
What Debate Teaches Us About Listening to Each Other	\$25	1			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	1
4 Ways to Add Value and Earn a Raise	\$25	1			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	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	1
A Hopeful History of Humankind with Rutger Bergman	\$25	1			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	1
Being Unapologetically Ambitious with Shelley Archambeau	\$25	1			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	1
David Epstein on Why Generalists Triumph in a Specialized World	\$25	1			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	1
Finding Meaning and Pleasure Through Suffering with Paul Bloom	\$25	1			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	1
Good Habits, Bad Habits with Wendy Wood	\$25	1			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	1
How to Land Your Dream Job	\$25	1			1		1	1	1		1	1	1	1	1	1

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SKILLS DEVELOPMENT: PERSONAL DEVELOPMENT																
How to Overcome Your Fear of Failure	\$25	1			1		1	1	1		1	1	1	1	1	
How to Stay Relevant, Reinvent Yourself, and Thrive	\$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	\$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	
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
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MFDA - Mutual Fund Dealers Association of Canada

FSRA - Financial Services Regulatory Authority of Ontario

AIC - Alberta Accreditation Committee (Alberta Insurance Council)

ICBC - Insurance Council of British Columbia

ICS - Insurance Councils of Saskatchewan

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

CFA - Chartered Financial Analyst

CPA - Chartered Professional Accountants

Advocis - The Financial Advisors Association of Canada

LSO - Law Society of Ontario

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