# APPENDIX 1

Institute of FINANCIAL PLANNING

# Application for recognition of a professionnal development activity - For individuals

Please email the following documents to the Institute of Financial Planning (the Institute) for each course for which you want recognition:

- This form
- Syllabus, if it is a university course
- Attendance record or transcript

Email address for the Institute: accreditation@institutpf.org

# IDENTIFICATION OF APPLICANT

| | |
|---|---|
| **Identification no.** | **Name** |

| | |
|---|---|
| **Telephone number** | **Email address** |

# INFORMATION ABOUT THE PROFESSIONAL DEVELOPMENT ACTIVITY

| | |
|---|---|
| Title of activity: | |
| Activity provider: | |
| Instructor: | |
| Is the instructor a financial planner? | ○ Yes ○ No ○ Don't know ○ N/A |
| Professional bio of instructor (if you do not have this information, please specify) | |
| Date activity was completed, including exam (yyyy-mm-dd) | |

Type of activity:

- ○ Classroom course
- ○ Webinar
- ○ Colloquium, conference, convention
- ○ Videoconference
- ○ Distance education

Difficulty level: ○ Beginner ○ Intermediate ○ Advanced

Subject matter(s)

- ☐ Legal aspects
- ☐ Insurance
- ☐ Finance
- ☐ Taxation
- ☐ Investment
- ☐ Retirement planning
- ☐ Estate planning
- ☐ Compliance with standards, ethics and professional practice (SC)
- ☐ Compliance with standards, ethics and professional practice related specifically to financial planning (SC-FP)

# COMPLETE DESCRIPTION OF ACTIVITY

## 1. Knowledge, competencies and professional skills

Identify the knowledge, competencies, and professional skills that the activity develops and briefly explain how it develops them (refer to section 16 of the Regulation respecting compulsory professional development).

## 2. Method of evaluation

If this is a distance education or online training activity, describe the summative evaluation and the result required to pass the activity.

## 3. Course outline

Complete the attached course outline (Appendix 1A) by listing the topics and subtopics covered, with the time allotted to each and the related objective(s). You can also create your course outline using the same information.

# REQUESTED RECOGNITION

| | |
|---|---|
| Total activity duration (minimum 1 hr) | Hr |

| | |
|---|---|
| Number of professional development units (PDUs) requested | |

Does this course contain information to promote specific financial products or services?

| | |
|---|---|
| ◯ Yes. How many hours or minutes? | ◯ No |

| **Institute of Financial Planning (IQPF) subjects** | Number of hours | **Number of PDUs** |
|---|---|---|
| ☐ SFPA | | |
| ☐ SC | | |
| ☐ SC-FP | | |
| | **Total** | |

## Statement

I,____________________________, confirm that all the information provided in this form is true, and I accept all conditions related to the recognition of the training activity.

Date: ________________________

◯ I understand that checking this box constitutes a legally binding signature.

◯ I chose to fill in this form in English.

# APPENDIX 1A: COURSE OUTLINE

Complete this course outline by listing all topics and subtopics covered, with the time allotted for each and the related objective(s). You can also create your course outline using the same information.

| **Title of activity:** | |
|---|---|
| General objective:<br>*By the end of the training activity, the participant will be able to…* | |

| **Specific objectives**<br>*States what the participant will be able to do at the end of the training activity. Contains an **action verb** describing an observable behaviour* | **Elements of content**<br>***Topics addressed** by the training activity with respect to the specific objective* | **Learning strategy**<br>*e.g., lecture, practical exercises, group discussion, team workshop, case studies, etc.* | **Teaching material**<br>*e.g., PowerPoint, textbook, tools, exercise book, etc.* | **Time spent**<br>*on each topic* | **Subjects Institute of Financial Planning (IQPF)*** |
|---|---|---|---|---|---|
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**Subject list and abbreviations:*

SC: Training in compliance with standards, ethics and professional practice
SC-FP: Training in compliance with standards, ethics and professional practice related specifically to financial planning
SFPA: Legal aspects, insurance, finance, taxation, investment, retirement, and estates.

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