

# Financial Planning & Wealth Management (FPWT) – Information for Prospective Students Agreement

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Students who wish to apply to study in the Financial Planning & Wealth Management (FPWT) Ontario Graduate certificate program are required to carefully read this agreement and must sign below indicating they fully understand and accept the terms and conditions of studying within the FPWT program.

## Agreement Terms

Students are required to purchase the course materials for the Investment Funds in Canada (IFC) course and will receive one (1) attempt at the Investment Funds in Canada licensing exam for a cost of \$435. This course is offered in the second term of the program and this fee is mandatory, in addition to the student's tuition.

Student **can also choose** to enrol in the Canadian Securities Course (CSC)<sup>®</sup>, the Conduct and Practices Handbook (CPH)<sup>®</sup> Course and/or the Canadian Insurance Course (LLQP) on a voluntary basis.

Please Note: Enrolment in the Financial Planning & Wealth Management program **does not** constitute enrolment in the actual licensing course(s) offered by MAGE or the Canadian Securities Institute (CSI). Separate registration and fees determined by the licensing association will apply and the additional registration fees are not included in the tuition for the Financial Planning & Wealth Management program. <sup>1</sup>

## How to Apply for Membership

Visit the [Canadian Securities Institute – Orientation for new students section](#).

## How to Register for the Investment Funds in Canada (IFC) Course & One Exam Attempt

1. Visit The [Canadian Securities Institute website](#)
2. Find the Investment Funds in Canada course
3. Read all the tabs
4. Select the PRICES tab and choose one of the two options:
  - a. Option 1: Value Pack Combo
  - b. Option 2: Online course with hard copy textbook

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<sup>1</sup> The trademarks CSI, CSC<sup>®</sup>, CPH<sup>®</sup>, The Canadian Securities Institute, The Canadian Securities Course and the Conduct and Practices Handbook Course, are owned by MAGE. MAGE does not sponsor, license or necessarily recommend these notes and/or study materials for any of its courses. Lambton College is an independent supplier of educational services. <sup>®</sup>Registered trademark of Moody's Analytics Global Education (Canada), Inc ("MAGE").

5. Add the course to your cart
6. Login or Register to Login

Please Note: There are additional costs for a second and third attempt at writing the IFC exam or for booking a computer-based exam. Lambton College does not cover any of these associated costs. [See more information about exams.](#)

## Statement of Agreement

I understand that the Investment Funds in Canada course is a required component of the Financial Planning & Wealth Management (FPWT) Ontario Graduate Certificate program at Lambton College in Toronto. When I am required to take the course, I will have to pay \$435 and I will receive the materials and one (1) attempt at the IFC exam only. I may also choose to enrol in other courses on a voluntary basis. Costs of such memberships and certifications to these governing bodies are the sole responsibility of the student.

Student Name: \_\_\_\_\_ Date: \_\_\_\_\_

Student Signature: \_\_\_\_\_

This document is to be kept on file. Students are to keep one copy for their records.