**Topics**

Role of Financial Planner

Financial Planning Process

Life Cycle and Wealth Cycle

Risk Profiling and Asset Allocation

Financial Portfolio and Wealth Management

Life Insurance

Long-Term-Care Insurance

Real Estate

Wealth Management and the Economy

Financial Cycles and Indicators

Risk Management

Gold

Health Insurance

Elements of Taxation

Dividend Tax

Wealth Tax

Inheritance Law

Mutual Funds, ETFs and Index Funds

Private Equity Funds

Hedge Funds

Structured Products

Portfolio Management Services

Strategic Asset Allocation vs. Tactical Asset Allocation

Regulatory Environment in Canada

Planning for Your Retirement and Creating Income for Life

Using Company Retirement Plans

Transferring Wealth with Estate Planning

Transferring Wealth within the Family: Inheritance Issues for Family Businesses

Withdrawal Plan

Transfer Plan

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