

CUSTOMIZED LEARNING**GLOBAL INVESTMENT FUNDS™ (GIF)™**

The GIF provides foundational knowledge that prepares Advisors to give effective advice to clients on mutual fund investments based on a client's objectives, timeline and risk tolerance. It also provides greater insight into a mutual fund representative's legal, ethical and professional responsibilities.

Successful course completion earns your Mutual Fund Dealer or Dealing Representative License

YOU WILL DEVELOP

A better understanding of financial markets and the mutual funds industry

The ability to analyze the risk-return relationship of investments

Better methods to create and effectively manage client portfolios

Deeper insight into assessing mutual fund performance and fee structure

LEADS TO CAREERS SUCH AS:

- Mutual Funds Licenced Dealer
- Financial Planner
- Discount Broker
- Investment Representative

Consider The IST® course as an alternative learning pathway. The IST® combines comprehensive investment funds knowledge and licensing with a deeper understanding of the Canadian financial services landscape.

GLOBAL INVESTMENT FUNDS™ (GIF)™

Get your mutual fund sales license through the most popular investment funds course available. Global Investment Funds (GIF) course will give you the certification you need to start giving advice and to start helping your clients make smart investment decisions based on their needs.

Earn your Mutual Fund Dealer - Dealing Representative License

Meet regulatory requirements to register for a license to sell mutual funds

Gain the knowledge to give advice and start building your career as a mutual funds sales representative

WHO SHOULD ENROL

Enroll in the GIF if you're:

- Seeking your license to sell mutual funds
- A financial services professional seeking to grow your knowledgebase
- Want a broader understanding of capital markets

COURSE LEADS TO THE FOLLOWING CREDENTIALS:

PFP Certificate (Personal Financial Planner)

CERTIFICATE IN FINANCIAL SERVICES ADVICE

CERTIFICATE IN ADVANCED MUTUAL FUNDS ADVICE

EVERYTHING YOU NEED TO SUCCEED

The GIF prepares you to advise clients about their mutual funds investments based on their objectives, timeline and risk tolerance. It also explains a mutual fund representative's legal, ethical and professional responsibilities.

Learn About:

- The financial markets and mutual fund industry
- Your role as a mutual fund sales representative
- The importance of the "Know your client" rule and how to apply it
- Analyzing the risk-return relationship of investments
- Explain the process of creating and managing investment portfolios that meets client's needs
- The different types of mutual funds
- The function of exchanges and clearinghouses
- Assessing mutual funds performance and fee structure

Approximate Hours of Study

Hours of Study	90 - 140 hours
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** In order to provide some guidance to course participants as to the length of time it will take to be sufficiently prepared to write the final examination, APII® has prepared this estimate of the number of hours an average participant could possibly expect to spend studying for a course. Please note that **these are only recommended hours of study** developed based on research and our course content, however, this does not mean that some students with exceptional

backgrounds would not take less time than recommended or that students with no background at all in finance or economics would not take longer than the maximum.

EXAM WEIGHTINGS

(weightings are approximate)

Introduction to the Mutual Funds Marketplace	13%
The Know Your Client Communication Process	19%
Understanding Investment Products and Portfolios	18%
The Modern Mutual Fund	5%
Analysis of Mutual Funds	10%
Understanding Alternative Managed Products	3%
Evaluating and Selecting Mutual Funds	16%
Ethics, Compliance, and Mutual Fund Regulation	16%

EXAM INFORMATION

Exams	1
Exam Format	Paper or Computer Based
Exam Duration	3 Hours
Question Format	Multiple Choice
Questions Per Exam	100
Attempts Allowed Per Exam	2
Passing Grade	70%
Assignments	Yes

ENROLLMENT PERIOD	
Enrollment Period	6 MOIS

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