CIFP Retirement Planning Course for Investors

The CIFP Retirement Planning Course will equip investors with the comprehensive knowledge they need to discuss retirement concepts and strategies with their advisors.

This course provides a detailed look at how investors need to plan for retirement, how they need to use their financial assets during retirement, and how they need to make financial decisions related to retirement. The course also provides a detailed look at the estate planning process and the many considerations and strategies involved in developing an estate plan.

The course is online and begins with an overview of retirement planning with case studies followed by a detailed look at pensions. It then examines the characteristics of registered retirement savings plans to understand how they are used in accumulating funds for retirement. It goes on to explore the taxation of retirement income and investment planning, along with tax planning opportunities that are available.

The course then addresses the tools of estate planning including property interest, family law, intestacy, probate, wills, powers of attorney, taxation upon death, trust and estate freezes.

Whether working with a Financial Advisor or self planning, this course will help you acquire the knowledge, judgment and expertise to understand both the retirement and estate planning process.

The Course:

This course is an "Audit" course for investors and therefore, no examination is required to complete this course. Investors successfully completing the formal assessments will receive a course completion certificate.

Topics Include:

- Introduction to Retirement Planning
- Client Engagement Skills
- Government Sponsored Retirement Income Programs
- Employer Sponsored Pension Plans
- DPSPs, RRSPs and TFSAs
- RRIFs, LIFs, and Locked-in RRIFs
- Education Planning
- Taxation during Retirement
- Retirement Savings Plan
- Post-retirement Planning
- Retirement Decisions
- Lending in Retirement
- Family Relationships and Support Obligations
- Family Property and Other Issues
- Wills and Power of Attorney for Property
- Living Wills, Forms of Property Interests, Intestacy and Probate
- Personal Trusts
- Other Estate Planning Considerations
- Death and Taxes

For further information on this course contact:

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