Pro-Seminars

SSC # 164 – PROVINCIAL REALITIES IN CANADIAN INSURANCE & FINANCIAL PLANNING

This course is eligible for:

2.0 Life & A&S CE Credits for BC, SK, MB & ON.

2.0 Life ONLY CE Credits for AB.

Target Audience

This course is designed for:

- Life-licensed advisors
- Financial planners
- Insurance specialists
- Wealth managers
- Retirement planners
- Estate-planning professionals
- Advisors working with business owners
- Advisors serving pre-retirees and retirees
- Advisors supporting aging-parent households

Purpose of the Course

This course is designed to:

- Elevate advisor competence in cross-Canada planning
- Integrate insurance into financial, retirement, and estate strategies
- Provide practical, province-specific case studies
- Strengthen compliance, documentation, and due diligence
- Support advisors in making suitable, defensible recommendations
- Prepare advisors for the next decade of demographic and economic change

1.5 Learning Objectives

By the end of this course, advisors will be able to:

1. Understand provincial differences
2. Integrate insurance into holistic planning
3. Evaluate suitability and compliance requirements
4. Apply planning frameworks to real Canadian scenarios
5. Recommend appropriate insurance solutions
6. Demonstrate due diligence