Program Objectives

The objective of the Financial Services Practitioner Program at Seneca College is to develop the foundation for individuals to become professional financial services practitioners. They will be able to build practices in insurance, savings and investment, retirement planning, personal, business and estate planning.

Admissions Requirements

Program Eligibility

- Candidate must possess an undergraduate degree, college diploma or have minimum 5 years of work experience.
- Candidate must be a Canadian Citizen, Landed Immigrant or have permanent residence status.
- International Visa Students are welcome.

Applicant Selection

- Candidate must be fluent in the English language, both written and oral.

Your Career

Graduates from this program will have completed the requirements to obtain their life insurance license and mutual fund license. Graduates will be well suited to work in financial services entry level sales and marketing positions in the rapidly growing financial services sector such as life insurance, wealth management and financial planning. They will also be able to apply their skills to develop a successful independent financial services practice.

Program Description

This intensive two semester program is designed to prepare students to be professionals in the area of sales and marketing in the financial services industry. Students are introduced to the skills necessary to build practices in life insurance, living benefits, wealth management and group insurance. They will have core competencies in developing comprehensive financial plans to meet the needs of individuals, families and businesses. Developed and delivered by industry experts, this program has a special emphasis on sales and marketing skills that will provide students with the tools necessary to deliver personal financial services. Graduates of this program earn credits toward the internationally recognized designations of FLMI (Fellow, Life Management Institute- a professional designation program by LOMA), CFP (Certified Financial Planner) and CLU (Chartered Life Underwriter).

Program Outcomes

Upon successful completion, a graduate of the Financial Services Practitioner Program will:

- Be licensed to sell life and health insurance and mutual funds
- Have an acute understanding of Canada's life insurance industry and all aspects of the selling and buying process
- Have developed a business and marketing plan based on personal goals and have the measurement tools to track progress
- Have created the system and procedures to manage their business in compliance with all applicable legislation, and best practices
- Have a solid foundation with which to build a successful career as a financial services practitioner
- Acquire the first level LOMA (Life Office Management Association) certificate
- Acquire three credits towards the CFP (Certified Financial Planner) designation
- Acquire three credits towards the CLU (Chartered Life Underwriter) designation

Field Placement

This 28-week program provides the student with the opportunity to become involved in the actual marketing of financial services products after the first half of the first semester. Placement in a financial institution or sales offices ensures students will have the opportunity to apply their skills by assisting experienced advisors in building financial plans for their customers.

Curriculum

Semester 1		**Semester 2**	
Subject name	**Hrs/Wk**	**Subject Name**	**Hrs/Wk**
FSP 101: Insurance Licensing Program- LLQP (Weeks 1-7 only)	6	FSP 201: Canadian Investment Funds- CIFC (Weeks 1-7 only)	6
FSP 102: Insurance Company Operations- LOMA	3	FSP 202: Interpersonal Communication Skills for Financial Planners	3
FSP 103: Foundation in Life Insurance and Living Benefit Products	3	FSP 203: Foundations in Investments and Retirement Products	3
FSP 104: Foundations in Investments, Group and Speciality Products	3	FSP 204: Ethics, Compliance and Professional Conduct	3
FSP 105: Professional Selling Skills for Financial Services Practitioner	3	FSP 205: Contemporary Practices in Financial Planning- CFP	3
FSP 106: Financial Planning Fundamental- CFP	3	FSP 206: Comprehensive Practices in Risk and Retirement Planning- CFP	3

***This program is made possible by the generous contribution from our sponsors (founding members):

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