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MODULE ON CRM2 REQUIREMENTS FOR FUNDS INDUSTRY

This online course, available free of charge, is offered by IFSE Institute (the educational arm of IFIC) to teach financial advisors about disclosure requirements and advisor obligations under CRM2. The course is designed for investment dealers, mutual fund dealers, exempt market dealers and their representatives.

The module provides plain-language explanations of key terms, and reviews sample cost and performance reports. It presents advisor-client conversations on key concepts, such as individual versus fund performance measurement, book cost, suitability and cost disclosure.

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