



# Path to a Mutual Fund License

CHOOSE AGF-IFSE Training program class at [www.primerica.ifse.ca](http://www.primerica.ifse.ca)

Register at least 3 weeks in advance to ensure enough time to study. Availability is on a first come, first-serve basis

Expect an email from IFSE (email shown as "ifsegeneral") approx 3-5 days after registering. the email will have username & password. Log into your student profile to access course material.

Course material is found online you will not receive a textbook

Register for your CIFC exam by going to [www.ifse.ca](http://www.ifse.ca). Click on Exam Calendar link on that page and follow instructions at bottom of exam schedule. to register for your exam (not applicable to 2 day courses which have a pre-specified exam date)

\$395 Registration covers online access to CIFC Course offered by IFSE, 1 initial exam attempt and covers the initial mutual funds license application fee.

Please read all instructions found online. there are no refunds or substitutions allowed.

Earn a \$300 Bonus after getting licensed and completing a minimum of \$1000 in Mutual Fund production within 90 days of becoming licensed.





Que faites-vous après le travail?



## AGF - IFSE MUTUAL FUND LICENSING PROGRAM

In conjunction with IFSE, and the sponsorship of AGF, Primerica is pleased to offer the **AGF-IFSE Mutual Funds Licensing Program**. This program is intended to help you obtain your mutual funds licence quickly. This program includes:

- **online access to the Canadian Investment Funds Course (CIFIC) offered by IFSE;**
- **one initial attempt at the CIFIC exam;**
- **AND...it covers the initial mutual funds licence application fees!**

Please make sure you are familiar with the *Conditions* of this program outlined below prior to registering. There are no refunds or substitutions allowed.

### Registration instructions and preparation for the review class:

1. Choose the AGF-IFSE Mutual Funds Training Program class you wish to participate in at **[www.primerica.ifse.ca](http://www.primerica.ifse.ca)**.
2. You should register at least three weeks in advance of the review class to ensure you have enough time to study the course material (not applicable to Self-Study). Availability is on a first-come, first-serve basis so we cannot guarantee a spot prior to the deadline.
  - **Students who are not pre-registered will not be allowed into the course.**
3. To register for your desired course, look for the link:

*Click here to register for an AGF-IFSE Mutual Fund Course.*
4. Expect an e-mail from IFSE (e-mail shown as "Ifsegeneral") approximately 3-5 days after your registration. The e-mail will contain your username and password. Use this information to log into your student profile to access the course material.
5. **The course material is found online. You will not receive a textbook.**
6. Register for your CIFIC exam by by going to **[www.ifse.ca](http://www.ifse.ca)**.
  - Click on the 'Exam Calendar' link found on that page and follow the instructions at the bottom of the exam schedule to register your exam.
  - This is not applicable to the 2-day courses which have a pre-specified exam date as posted on **[www.primerica.ifse.ca](http://www.primerica.ifse.ca)**.



Que faites-vous après le travail?



YOUR PARTNER IN  
FINANCIAL SERVICES EDUCATION  
VOTRE PARTENAIRE DANS  
L'ÉDUCATION DES SERVICES FINANCIERS

## AGF - IFSE MUTUAL FUND LICENSING PROGRAM

### Conditions

The AGF-IFSE Mutual Funds Licensing Program is only offered to Primerica associates who are in good standing with the Primerica companies and who have been issued a solution number.

**REVIEW CLASS:** The AGF-IFSE Mutual Funds Licensing Program includes: online access to the Canadian Investment Funds Course (CIFIC) offered by IFSE, a **TWO-DAY REVIEW CLASS with an IFSE instructor**; an initial attempt at the CIFIC exam and the initial mutual funds licence application fees. There are no refunds or substitutions once the registration has been processed. This program is intended to help you obtain your mutual funds licence quickly. Its success is driven by adequate preparation before class and the combination of the 2-day review class and the exam on the specified date. The exact location and time of the 2-day review class and the exam is posted on the website: [www.primerica.ifse.ca](http://www.primerica.ifse.ca).

This program allows you to attend the 2-day review class **only once**. You must attend the 2-day review class and take the exam on your selected date. If you don't attend any portion of the two-day review class and you don't take the initial exam, you will be allowed to reschedule the class and the exam to a later date for a fee of \$60 plus applicable taxes. If you don't reschedule at least one business day in advance, your exam will be scored as "zero" (failed), your total number of exam attempts will be reduced by one attempt, and you will be required to pay the reschedule fee of \$60 plus applicable taxes to reschedule to a later course. If you reschedule at least one business day in advance, your initial exam attempt will be preserved, but you will still be required to pay the reschedule fee of \$60 plus applicable taxes.

**WEBINAR:** The AGF-IFSE Mutual Funds Licensing Program includes online access to the Canadian Investment Funds Course (CIFIC) offered by IFSE, a live online **WEBINAR** with an IFSE instructor; an initial exam attempt at the CIFIC exam and the initial mutual funds licence application fees. There are no refunds or substitutions once the registration has been processed. This program is intended to help you obtain your mutual funds licence quickly. Its success is driven by adequate preparation before the Webinar and taking the exam within 6 weeks of the Webinar. Specific details about the Webinar and your exam session will be sent to you by e-mail. A reschedule fee of \$60 plus applicable taxes applies for any change to the Webinar.

**SELF-STUDY:** The **SELF-STUDY** AGF-IFSE Mutual Funds Licensing Program includes online access to the Canadian Investment Funds Course (CIFIC) offered by IFSE; an initial exam attempt at the CIFIC exam and the initial mutual funds licence application fees. There are no refunds or substitutions once the registration has been processed. This program is intended to help you obtain your mutual funds licence quickly.

You will receive your login information from IFSE by e-mail within 3-5 days of registration. If you do not receive your login information, please contact Primerica Customer Service. If you are experiencing technical difficulties using the IFSE online system, please contact IFSE directly at 1-888-865-2437.

Please arrive on time and be prepared to present photo identification for all sessions, including the exam session.

If you don't write the exam on the specified date, your exam will be scored as "zero" (failed) and your total number of exam attempts will be reduced by one attempt. This program includes one initial exam attempt and two rewrites (extra fee \$35 plus taxes per rewrite), for a total of three attempts. The total number of exam attempts may be reduced if a condition of the program has been broken, as described above. Your enrolment in the Program will end upon the third attempt, or after one year from your initial registration date, whichever comes first.

If you respect the conditions described above and fail the exam on the scheduled date, you may retake the exam for a fee of \$35 plus applicable taxes. You must schedule your rewrite exam through your IFSE student profile. Do not send rewrite requests to Primerica. Please note that a reschedule fee and/or a late entry fee may apply when scheduling an exam. Please refer to IFSE's fee schedule online for more details.

Your exam result will be available under your student profile online. Please do not contact IFSE or Primerica for exam results. You may print a copy of your exam result and attach it to your mutual funds licence application.



Que faites-vous après le travail?



Once you pass the CIFIC exam, you may apply for a mutual funds licence in your province by completing the NRD Form (33-109F4) available through your Regional Vice President (RVP). If you do not apply for your mutual fund licence within one year of registering in the Program, the Program will not cover any licence fees.

If you respect the conditions described above and you apply for your licence between January 1<sup>st</sup> and October 31<sup>st</sup>, then the initial licence application fee, the NRD fee and the bond fee will be covered by the Program. Please note that you will be required to pay for your licence renewal fees which are due in November; as the Program does not cover the licence fees for a full year. If you pass the CIFIC exam late in the year, you may want to consider activating your licence on January 1<sup>st</sup> of the following year.

If you respect the conditions described above, and you apply for your licence between November 1<sup>st</sup> and December 31<sup>st</sup>, then you must pay your renewal fees with your application. The Program will cover the licence application fees, the NRD fee and the bond fee for the current calendar year.

**For Quebec ONLY:**

\* The Company will only pay the Chambre de la sécurité financière fee ONE TIME per recruit / representative. If the Company has previously paid for a recruit / representative's Chambre de la sécurité financière fee under any other program, then any reference above to the Program covering fees on behalf of a recruit / representative EXCLUDES the Chambre de la sécurité financière fee.