



CSI Designations Graduation Celebration

Congratulations Class of 2020-2021!



Canadian Securities Institute
A Moody's Analytics Company

NOVEMBER 30, 2021

Meet The Presenters



MARIE MULDOWNEY

Host/Moderator

Managing Director

CSI & Moody's Analytics



TIFFANY HARDING

CFP®, TEP, FEA, CLU®, CDFA, MFA-PTM®, CIWM, FCSI®

Guest Speaker & Designation Council Member

Vice President, Head of Wealth Planning

Gluskin Sheff + Associates Inc.

Our Designation Community



131
Graduates

3,220
In good standing

1,273
Digital badges
accepted



827
Graduates

7,451
In good standing

3,064
Digital badges
accepted



39
Graduates

518
In good standing

247
Digital badges
accepted



6
Graduates

94
In good standing

32
Digital badges
accepted



666
Graduates

5,719
In good standing

2,671
Digital badges
accepted

How to add your badge on your LinkedIn account

Step 1: Accept the Badge



[Additional Details](#)

Chartered Investment Manager (CIM®)

Issued by [Canadian Securities Institute](#)

This digital credential indicates that the individual has completed the requirements to achieve the Chartered Investment Manager (CIM®) designation. They possess the expertise and experience to create Advanced discretionary investment and portfolio management strategies that best serve the unique needs of affluent and institutional clients. They are also adept at evaluating industry trends, managing risk, and developing and enhancing client relationships.

Skills

[Asset Allocation](#)

[Portfolio Construction](#)

[Portfolio Measurement](#)

[Security Analysis And Selection](#)

Earning Criteria

[Completed 375-535 hours of study](#)

[Successfully passed two 3-hour proctored credentialing examinations](#)

[Met 2-year Experiential Requirement](#)

[Annual adherence to the Code of Ethics and Continuing Education Requirements](#)

[Overall Designation Requirements](#)

[Information in French](#)

Step 2: Add the designation to your Licenses & Certifications section

Licenses & certifications



Chartered Investment Manager (CIM®)

Canadian Securities Institute

Issued Nov 2021 · Expires Nov 2022

[See credential](#)

Designation Governance

- » Chair
- » Council:
 - Financial Institution Representatives
 - Education Partner Representatives
 - Financial Professionals
- » Ethics Committee



Congratulations!

- » Fellow of the Canadian Securities Institute (FCSI®)
- » Chartered Investment Manager (CIM®)
- » Certified International Wealth Manager (CIWM)
- » Estate & Trust Professional (MTI®)



Become a Trusted Advisor

- » Understand values and beliefs
- » Master emotional intelligence
- » Practice listening and empathy skills
- » Recognize different backgrounds and experiences
- » Understand learning styles and adapt
- » Be planning-focused, not product-focused



Always Be Learning

- » Be curious
- » Ask questions
- » Seek out mentors
- » Align yourself with specialists across multiple disciplines



Give Back

- » Volunteer
- » Mentor others
- » Serve on boards/
committees
- » Pro bono work
- » CSI ambassador



Be a Role Model

- » Be well
- » Learn well
- » Listen well



CIM[®] Award of Excellence Recipients



GARRY HEIDINGER

CIM[®]



JOSHUA HARRINGTON

CIM[®]



LORRAINE ATHAIDE

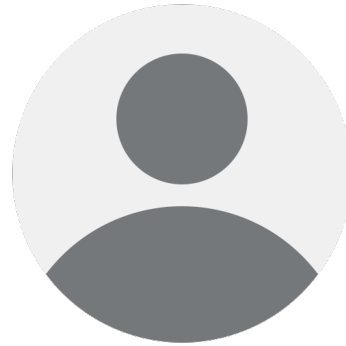
CIM[®]

CIWM Award of Excellence Recipients



EDITH BEAUCAGE

CIWM



PIERRE-YVES DIONNE

CIWM



MÉLANIE LAGACÉ

CIWM

MTI[®] Award of Excellence Recipients



ELIE ROTH

MTI[®]



SCOTT A. E. HIND

MTI[®]

FCSI[®] - Highest Honour in Financial Services

Fellows of CSI (FCSI[®]) hold an approved designation, have met further specific course requirements, and have at least seven years of financial services work experience.



Supporting our Designation Community



RESOURCES



WEBINARS



GRADUATION



GIVING BACK

View our 2020 – 2021 Graduating Classes



csi.ca/fcsi



csi.ca/cim



csi.ca/ciwm



csi.ca/mti

Congratulations!

For all questions, please email us at designations@csi.ca