



LEADERS IN FINANCIAL SERVICES  
UNPARALLELED EXPERTISE, EXPERIENCE AND ETHICS

*Credentials That Matter*





### 3,500 LEADERS ELEVATING AN INDUSTRY

FCSIs are an elite group of financial services professionals who meet stringent education, experience and ethics requirements to obtain and maintain their Fellow status. While they specialize in a particular aspect of financial services, FCSIs are also required to have a strong understanding of other areas of the industry – empowering them with integrated knowledge and insights.

## THE FELLOW OF CSI® – *The Pinnacle Financial Services Credential*

The Fellow of CSI (FCSI) is the top credential conferred by CSI Global Education Inc. (CSI), a leader in financial services education. FCSIs are an elite group of financial services professionals who have been charged with leading the industry for the past 35 years. They set and elevate the standards for professionalism and are in tune with the nuances of this rapidly evolving industry. Their unparalleled commitment to knowledge, ethics and the betterment of the industry place them among the finest and most dedicated in financial services.

### DEDICATED LEADERS YOU CAN TRUST

The FCSI is one of the most demanding credentials in the Canadian financial services industry to obtain and maintain. Only an elite group of professionals meet its advanced requirements – and only a portion of this group are dedicated enough to invest the time and effort required to earn and keep the Fellow.

The result? **A leader you can trust.** Working with an FCSI means forming a partnership with a true professional who has more education, more experience and an exhaustive, up-to-date knowledge base – someone built to add value and cater specifically to your needs.

### SETTING AND EXCEEDING THE STANDARD OF EXCELLENCE

*Education. Experience. Ethics.* Combined, these form the foundation of trust in financial services. FCSIs are held to higher standards in all of these categories – going above and beyond the bare minimum to exceed expectations. They are committed – and required – to do so throughout the duration of their careers.

## More Education

How advanced is the FCSI's education requirement? The top financial services designations are merely *prerequisites* to the Fellow. Each FCSI must already hold one of the following:

Personal Financial Planner (PFP®)	Financial Management Advisor (FMA®)
Chartered Strategic Wealth Professional (CSWP®)	Fellow, Institute of Canadian Bankers (FICB®)
Chartered Investment Manager (CIM®)	Certified Financial Planner (CFP®)
MTI Estate and Trust Professional (MTI®)	Chartered Financial Analyst (CFA®)
Derivatives Market Specialist (DMS®)	Chartered Life Underwriter (CLU®)

In addition to holding a designation, each FCSI must complete two courses on subject matter outside of their designation field of expertise and take the Financial Services Industry: Business Drivers and Challenges (FSDC) course.

The result: an ever-expanding knowledge base at the helm of the financial services industry.

## More Experience

True knowledge is built and refined through a combination of education and hands-on experience. Only through experience can you develop insights to truly add value to your profession. FCSIs are required to have a minimum of seven years of financial services experience.

## More Ethics Training

To be an industry leader means significant responsibility. FCSIs must sign the FCSI Code of Ethics on an annual basis and are expected to set the standard of conduct in their field.

## More Requirements

Not just anyone can become an FCSI. To protect the integrity of the Fellow, all FCSI candidates must be endorsed by a direct supervisor as well as a sponsor who is already an FCSI.

As part of ongoing maintenance requirements, the FCSI must also be an active industry contributor. They may do this in a number of ways, including speaking engagements or mentoring future leaders.

## ABOUT CSI GLOBAL EDUCATION INC.

Since 1970, CSI has helped 800,000 financial services professionals gain distinction through education, developing their knowledge and skills year over year. CSI's credentials are internationally recognized and endorsed, and many of them are regulatory requirements.



Partner with an FCSI® today and  
let a distinguished leader help you  
reach your financial goals.

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