



**THE CANADIAN
ASSOCIATION OF
FINANCIAL
CONSULTANTS**



EDUCATIONAL PROGRAM



ABOUT THE CANADIAN ASSOCIATION OF FINANCIAL CONSULTANTS

The Canadian Association of Financial Consultants (CAFC) is an international professional organization chartered federally under Letters Patent granted by the Government of Canada. The Association has a world wide membership.

CAFC offers an educational program leading to the designation of Chartered Certified Financial Consultant (CCFC) issued to qualified graduates. The Association is multidisciplinary, drawing its members from the related but separate fields of accountancy, insurance, law, funds management, tax and pensions. The Association is forging a “new” profession that adopts the best features from these related professions and encourages the development of members' qualifications as financial consultants on the basis of their current professional qualifications.

Financial Consultants provide advice to clients in a wide variety of situations from the financial planner advising individual clients on investments, to those working as corporate financial officers, portfolio managers, security analysts and investment bankers in organizations as diverse as brokerage firms, mutual funds, banks, trust companies, corporate finance departments, insurance companies and other financial management firms

VISION

The vision of CAFC is to be the global leader in educating and certifying financial consultants.

MISSION

The mission of CAFC is to provide education and certification for financial consultants so that members qualified to use the designation Chartered Certified Financial Consultant are recognized internationally as trusted financial advisors.

THE CANADIAN ASSOCIATION OF FINANCIAL CONSULTANTS PROGRAM

The Canadian Association of Financial Consultants offers a program of studies leading to Advanced Diploma in Financial Consulting (ADipFC) on a distance learning basis to fulfill the requirements for the CCFC designation.

EDUCATIONAL COMPONENT

This is an in-service, work-based, independent study, Postgraduate program. It is tailored to meet the specific goals and objectives of professional people.

The program is an advanced concept of higher education, which offers mature people the opportunity to upgrade their qualifications while continuing to work. This program is concerned with the development of the whole individual, both as a functional generalist and a professional specialist,

The program assumes that theory and practice are inseparable and that practical financial experience contains within it elements of theory and reflection. Thus, this executive graduate program is person-centered as a guided learning experience that integrates practical work, personal growth and learning.

Successful completion of the ADipFC program satisfies the educational component requirements of the CCFC designation.



PROGRAM CONTENT

1. Financial Analysis - The syllabus comprises of:

- Group Financial Statements
- The measurement of Income and Capital
- Analysis and Interpretation of Financial Statements
- Developments in Financial reporting

2. Financial Strategy - The syllabus comprises of:

- Formulation of Financial Strategy
- Financial Management
- Business Valuations and Acquisitions
- Investment Decisions and Project Control

3. Risk Management and Control Strategy -

The syllabus comprises of:

- Management Control systems
- Risk and Internal Control
- Management of Financial Risk
- Risk and Control in Information Systems
- Stock Market instruments and Investment Decisions
- Analysis and valuation of equity investments
- Fundamentals of Investment

4. Corporate Finance - The syllabus comprises of:

- Introduction to corporate finance
- Key theories and applications
- Time value of Money
- Valuation techniques

5. Test of Professional Competence in Financial Consultancy.

This is a scenario-based which means that- important as knowledge is -it is not enough to reproduce large tracts of theoretical material, however accurately. You must demonstrate ability:

To analyze the details of the scenario.

To select the theoretical concepts and models which are directly applicable to the scenario and question.

To use your theoretical knowledge to structure, inform and support an answer which is nevertheless focused on details of the scenario given.

Assessment - Each module consists of proctored examination and assignments. Examinations are available world wide and on demand

- Pass Mark 70%

The Canadian Association of Business Administrators

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