



FINANCIAL SECURITY ADVISOR (AEC)

1 YEARS | 2 SEMESTERS

The program is designed to provide students with the necessary skills to work as financial security advisers as well as financial services advisers or agents.

The program focuses on the acquisition of competencies related to communication, accounting for individuals and businesses, customer service, organization of work, management tools, understanding economic information and the analysis of financial data.

At the end of the program, the students will be able to perform the following tasks:

- ✓ Analyze a client's financial situation
- ✓ Advise clients on investments
- ✓ Advise clients on the means to attain their objectives at retirement, and on different types of insurance
- ✓ Develop business relationships focused on support, on providing references (accounting, taxation, notarial, etc.) And on building a client base



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**Cégep de la Gaspésie
et des Îles**

CAMPUS DE MONTRÉAL



PROSPECTIVE JOBS

- ✓ Investment societies
- ✓ Credit unions and financial institutions
- ✓ Insurance companies
- ✓ Brokerages
- ✓ Claims adjusters firms
- ✓ Securities firms

In order to work as a financial services adviser, students may have to pass exams or meet other requirements as prescribed by the governing institution, after they obtain their AEC in Financial Services and Financial Security Adviser.



ADMISSION CONDITIONS

- ✓ Bachelor's Degree, diploma or recognized equivalent with a minimum of 15 years of formal education
- ✓ Fluency in English with an overall band score of 6.0 and above with nothing less than 6.0 band in any individual module | 6.5 (nothing less than 5.5 band in any one individual module)
- ✓ Completion of Pathway program from a recognized partner
- ✓ Applicant must be at least 18 years old



COURSE LIST

- ✓ Work Functions and Communication
- ✓ Computer Operations in Administration
- ✓ Legal Aspects of Financial Services
- ✓ Introduction to Financial Accounting
- ✓ Finance for Individuals
- ✓ Economic Environment
- ✓ Promotion, Sales and Billing
- ✓ Life Insurance and Group Insurance
- ✓ Taxation
- ✓ Investment for Individuals Marketing and
- ✓ Financial Services Management Tools and
- ✓ Insurance Disability Insurance and
- ✓ Retirement Products
- ✓ Organization of Work
- ✓ Financial Planning

PROGRAM INTAKES

September | January | May

LANGUAGE OF INSTRUCTION

English

LOCATION OF COURSE DELIVERY

Montreal

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