



## **Chapter Guide** Understanding Your New Responsibility

Advocis 

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## Pricing (Members and Non-members)

1. Members: \$25 minimum (\$15 remitted back to National)
2. Non-Members: \$35 minimum (\$15 remitted back to National)

Chapters will be responsible for refunds related to seminar registrants.

## Revenue Sharing

1. Chapters are required to remit \$15 for members and \$15 for non-members for seminar attendees.
2. Full accounting and allocation must occur within 30 business days following the seminar.

*Important: If multiple chapters wish to hold the event together, revenue sharing will be left to the discretion of the chapters involved, as documented in a joint agreement. A joint agreement template can be found at: <http://www.advocis.ca/secure/chapters/pdf/program-guidelines-R.pdf>*

## Promoting the Program

The main vehicles for chapters to promote this program will be email, “word-of-mouth” marketing, and the display and distribution of collateral materials.

The target audiences for this course are:

- CFP® and QAFP™ professionals;
- CLU® designated advisors and CLU® designation program candidates;
- PFA™ designated advisors; and,
- Experienced financial advisors, members or non-members of Advocis.

## Learning Objective

The objective of the Understanding Your New Responsibility Program is to inspire Financial Advisors and Planners to understand the technology they are using through case studies and review the rules around use of technology in the FP Canada Standards of Professional Responsibility guide.

## Participant Eligibility

Understanding Your New Responsibility is for all Financial Advisors and Planners regardless of experience level.

## What Participants Need

Participants will need:

- Blank paper or notepad
- FP Canada Standards of Professional Responsibility
- FP Canada Projection Assumption Guidelines

## Facilitator Resources

Upon submission of the online **Understanding Your New Responsibility Registration Form** available on Chapter Central, facilitator will receive access to the following resources:

Resource	Details	Format
Chapter Guide	The Chapter Guide outlines available facilitator resources and recommendations on how to run your event.	PDF
Video	The video to play in the event.	MP4
Reference Documents	FP Canada Standards of Professional Responsibility	PDF
	FP Canada Projection Assumption Guidelines	PDF

## Event Format

The following is how to run the event.

### Suggestion on How to Run your Event

1. **For in-person events**, provide each participant with blank paper and a printed copy of the FP Canada Standards of Professional Responsibility and the FP Canada Projection Assumption Guidelines for Participants.  
**For virtual events**, send the pdf copies of the FP Canada Standards of Professional Responsibility and FP Canada Projection Assumption Guidelines by email to participants.
2. Explain to participants that the video will introduce questions and case studies and the Facilitator can pause the video so that participants can write down their thoughts on paper, or discuss with other participants in breakout rooms or at their table.
3. When the Facilitator resumes the video, Dave Faulkner will discuss answers to the questions and case studies.

## CE Accreditation

The Understanding Your New Responsibility program has been approved for 1 CE credit (including Ethics and 1 Professional Responsibility credit with FP Canada).

## Questions

If you have questions, concerns, or comments regarding the facilitator resources, please contact Maja Golich, Education Coordinator via email at [mgolich@advocis.ca](mailto:mgolich@advocis.ca).