



GLOBAL PACIFIC
FINANCIAL SERVICES LTD.

Advocis Partner Programs - Building Your Business Through Niche Services

Submitted by Rica Zara on July 20, 2022 - 12:00am



Build Your Business Through Niche Programs!

At Advocis, we have partner organizations to offer niche programs and members - and we've got exciting news about each of them to share.

MFA-P? Designation

Knowledge Bureau & Excel Advocis members to earn the MFA-P Designation **at 31st**! This Special Summer School Offer provides a savings of \$270 on tax deductible tuition fees. Fundamentals for Professional Advisors with CAGP will be offered.

The MFA-P Designation will amplify your business and broaden your knowledge. With the MFA-P Designation, you will be able to cultivate and enhance the client experience for your business while helping the charity provide better stewardship to the donor. As the strategist in the centre of the plan, you will find that doing good is good for business. Do you work with a growing number of clients in trust and estate related matters? The STEP Canada diploma program offers a multi-disciplinary program to help you build your skills in this growing area.

Exemptions for CFP and CLU holders are available.

Canadian Securities Institute (CSI)

Discounts from CSI

Advocis members receive discounted pricing on many courses offered by the Canadian Securities Institute, including on topics such as ETFs, Behavioural Finance, IPPs, TFSAs and Alternative Strategies.

Certified Executor Advisor (CEA®) Designation

Engaging with executors while their testator parents are still living places you at the heart of the great wealth transfer. The CEA program trains advisors to engage with executors to ensure effective estate settlements and is now government-certified for refundable tax credits.

To learn more about all our partner programs, please visit our page via the button below.