LE ÇONSEIL

PRECISION. ETHICS. PERFORMANCE.

Our offers and trainings

Conseil des professionnels en services financiers — CDPSF

French and English

leconseil.ai

Who we are

Conseil des professionnels en services financiers — CDPSF

Our mission

Promote an environment where every individual can access the resources and support needed to enhance their financial, physical, mental and holistic health. Raise awareness, educate and encourage collaboration among stakeholders.

Our vision

Create an integrated, resilient community where prevention and health optimization are within everyone's reach — a world in which financial health and holistic health are shared priorities.

10+

years of experience

2

languages — FR and EN

Le Conseil brings together financial services professionals and provides them with tailored services and support, in order to promote their collective interests.

What we offer

Our service pillars for professionals and for the community

1

Accredited trainings

A catalogue of trainings recognized by the AMF, the IPF and CIRO/CSF, delivered online on the Thinkific platform in French and in English.

2

Trainings in accreditation

Individual trainings and two complete 5-hour trainings, each with bilingual video previews and reference guides, on their way to accreditation.

Our offers

One bundle for the whole catalogue — in French and in English

~~$150~~ **$75**

Special price until Nov. 30, 2026 · access until Nov. 30, 2027

Flat-rate bundle — the whole catalogue until Nov. 30, 2027

Access — EN

Access — FR

How our trainings work

Recognized trainings, delivered online, in both languages

01

Choose

Browse the catalogue and watch the video preview of each training, in French or in English.

02

Enrol

Access the training on the Thinkific platform, through the flat-rate bundle.

03

Complete

Work through the training online, at your own pace, on desktop, tablet or phone.

04

Earn credits

Your continuing education units are recognized by the accrediting bodies.

Recognized accrediting bodies

AMF
Autorité des marchés financiers

IPF
Institute of Financial Planning

CIRO / CSF
Canadian Investment Regulatory Organization and Chambre de la sécurité financière

Every training in the catalogue is produced in French and in English, with a video preview in each language.

SECTION 1

Accredited trainings

Trainings recognized for continuing education, delivered in French and in English on the Thinkific platform.

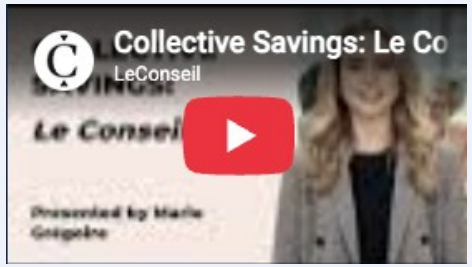
Accredited trainings

Video preview and access to the training — English and French

Collective Savings: Le Conseil

French version — Épargne collective : Le Conseil

5 PDUs · CIRO/CSF (collective savings · MFD PD · CP PD) · IPF (SFPA) · Expires Nov. 30, 2027



Video EN · YouTube

Vidéo FR · YouTube

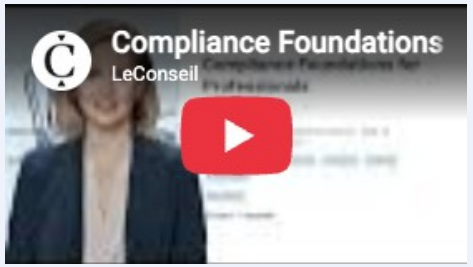
Training EN

Training FR

Compliance Foundations for Professionals

French version — Fondements de la conformité pour les professionnels

10 PDUs · CIRO/CSF (compliance · CM · MFD) · IPF (5 PDUs · SC) · Expires Nov. 30, 2027



Video EN · YouTube

Vidéo FR · YouTube

Training EN

Training FR

Mortgage Refinancing: The Reality Beyond the Numbers

French only — Le refinancement hypothécaire : la réalité au-delà des chiffres

1 PDU · Free · CIRO/CSF (AP/MG) · IPF (SFPA) · AMF (MG) · Expires Jan. 31, 2028



Vidéo FR · YouTube

Training FR

Errors and Omissions Insurance for All Financial Services Professionals

French version — L'assurance contre les erreurs et omissions pour tous les professionnels en services financiers

2 PDUs · CIRO/CSF (compliance) · IPF (SC) · Expires Feb. 9, 2027



Video EN · YouTube

Vidéo FR · YouTube

Training EN

Training FR

Accredited trainings

Video preview and access to the training — English and French

Protecting a Vulnerable Client

French version — Protéger un client en situation de vulnérabilité

3 PDUs · CIRO/CSF (compliance) · IPF (SC) · Expires Dec. 11, 2026



Video EN · YouTube

Vidéo FR · YouTube

Training EN

Training FR

Governance and Compliance

French version — Guide sur la gouvernance et la conformité

4 PDUs · CIRO/CSF (compliance) · IPF (SC) · Expires Nov. 30, 2026



Video EN · YouTube

Vidéo FR · YouTube

Training EN

Training FR

Introduction and Prevention Guide on Musculoskeletal Disorders (MSDs)

French version — Guide d'introduction et de prévention des troubles musculosquelettiques (TMS)

3 PDUs · CIRO/CSF (2 group insurance · 1 insurance of persons) · Expires Nov. 20, 2026



Video EN · YouTube

Vidéo FR · YouTube

Training EN

Training FR

Access to every training

One flat-rate bundle opens every Le Conseil training — accredited and in accreditation — in the language of your choice, until November 30, 2027.

Special price: $75 instead of $150, until November 30, 2026.

Bundle — EN

Bundle — FR

SECTION 2

Accreditation in progress

Individual trainings (group 1) and two complete 5-hour trainings (groups 2 and 3), on their way to accreditation.



Group 1 — Individual trainings

Each training is offered on its own and will replace the accredited trainings that are expiring

Charitable Giving — The Facts

French version — Dons de bienfaisance — les faits

3 PDUs · CIRO/CSF (collective savings) · 30 questions · Accreditation in progress



Video EN · YouTube

Vidéo FR · YouTube

Document EN

Document FR

Sustainable, Responsible and ESG Investing

French version — Investissement durable, responsable et ESG

2 PDUs · CIRO/CSF (compliance) · IPF (SC) · Accreditation in progress



Video EN · YouTube

Vidéo FR · YouTube

Training EN

Training FR

Understanding Savings Plans in Quebec

French version — Comprendre les REEE

5 PDUs · CIRO/CSF (collective savings) · Accreditation in progress



Video EN · YouTube

Vidéo FR · YouTube

Document EN

Document FR

The Main Savings Plans: A Comparative Analysis

French version — Les principaux régimes d'épargne

5 PDUs · CIRO/CSF · IPF · Accreditation in progress



Video EN · YouTube

Vidéo FR · YouTube

Document EN

Document FR

Group 1 — Individual trainings

Each training is offered on its own and will replace the accredited trainings that are expiring

Scripta Legal — Estate Settlement Guide

French version — Scripta Legal — guide du patrimoine

3 PDUs · CIRO/CSF (general) · Accreditation in progress



Video EN · YouTube

Vidéo FR · YouTube

Document EN

Document FR

Canadian Dental Care Plan

French version — Régime canadien de soins dentaires

3 PDUs · Accreditation in progress



Video EN · YouTube

Vidéo FR · YouTube

Document EN

Document FR

Our partners

Scripta Legal — online legal documents and interactive estate-planning guides, with a member discount for Le Conseil.

La Coopérative de notaires du Québec — a Québec-wide network of notaries specializing in mortgage refinancing.

Scripta Legal

La COOP

Group 2 — Insurance of Persons

One 5-hour training in 5 modules: life, disability, supplemental health, life annuities and segregated funds

A Guide to Life Insurance

French version — Guide sur l'assurance vie

Module 1 of 5 · Group 2 training · 5 PDUs · CIRO/CSF (insurance of persons) · IPF



Video EN · YouTube

Vidéo FR · YouTube

Document EN

Document FR

Guide to Disability Insurance

French version — Guide sur l'assurance invalidité

Module 2 of 5 · Group 2 training · 5 PDUs · CIRO/CSF (insurance of persons) · IPF



Video EN · YouTube

Vidéo FR · YouTube

Document EN

Document FR

Guide to Supplemental Health Insurance

French version — Guide sur l'assurance maladie complémentaire

Module 3 of 5 · Group 2 training · 5 PDUs · CIRO/CSF (insurance of persons) · IPF



Video EN · YouTube

Vidéo FR · YouTube

Document EN

Document FR

One training, five modules

The five guides in group 2 form a single 5-hour training: 5 PDUs with CIRO/CSF (insurance of persons) and the IPF, with a 50-question quiz. Accreditation in progress.

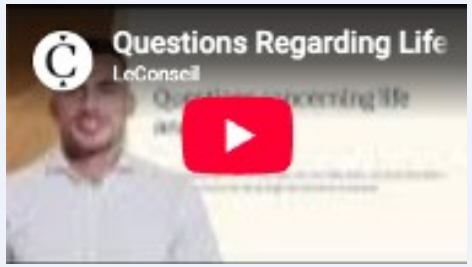
Group 2 — Insurance of Persons

One 5-hour training in 5 modules: life, disability, supplemental health, life annuities and segregated funds

Questions Regarding Life Annuities

French version — Questions concernant les rentes viagères

Module 4 of 5 · Group 2 training · 5 PDUs · CIRO/CSF (insurance of persons) · IPF



Video EN · YouTube

Vidéo FR · YouTube

Document EN

Document FR

Key Elements of Segregated Fund Contracts

French version — Éléments clés des contrats à fonds distincts

Module 5 of 5 · Group 2 training · 5 PDUs · CIRO/CSF (insurance of persons) · IPF



Video EN · YouTube

Vidéo FR · YouTube

Document EN

Document FR

Group 2 at a glance

5 modules · 5 PDUs · CIRO/CSF (insurance of persons) · IPF · 50 questions · Accreditation in progress. The video previews are already available in both languages, and each module rests on a reference guide recognized across the industry.

Group 3 — Health Insurance

One 5-hour training in 5 modules: critical illness, long-term care, coordination of benefits, travel and breast cancer

Guide to Critical Illness Insurance

French version — Guide sur l'assurance maladies graves

Module 1 of 5 · Group 3 training · 5 PDUs · CIRO/CSF (insurance of persons) · IPF



Video EN · YouTube

Vidéo FR · YouTube

Document EN

Document FR

Guide to Long-Term Care Insurance

French version — Guide sur l'assurance soins de longue durée

Module 2 of 5 · Group 3 training · 5 PDUs · CIRO/CSF (insurance of persons) · IPF



Video EN · YouTube

Vidéo FR · YouTube

Document EN

Document FR

Guide on the Coordination of Benefits

French version — Guide sur la coordination des prestations

Module 3 of 5 · Group 3 training · 5 PDUs · CIRO/CSF (insurance of persons) · IPF



Video EN · YouTube

Vidéo FR · YouTube

Document EN

Document FR

One training, five modules

The five guides in group 3 form a single 5-hour training: 5 PDUs with CIRO/CSF (insurance of persons) and the IPF, with a 50-question quiz. The reference guides come from the CLHIA and the AMF.

Group 3 — Health Insurance

One 5-hour training in 5 modules: critical illness, long-term care, coordination of benefits, travel and breast cancer

Guide to Travel Health Insurance

French version — Guide sur l'assurance maladie de voyage

Module 4 of 5 · Group 3 training · 5 PDUs · CIRO/CSF (insurance of persons) · IPF



Video EN · YouTube

Vidéo FR · YouTube

Document EN

Document FR

Breast Cancer and Critical Illness Insurance — Demystifying for Better Support

French version — Cancer du sein et assurance maladie grave — démystifier pour mieux accompagner

Module 5 of 5 · Group 3 training · Also available on its own on Thinkific



Video EN · YouTube

Vidéo FR · YouTube

Training EN

Training FR

Group 3 at a glance

5 modules · 5 PDUs · CIRO/CSF (insurance of persons) · IPF · 50 questions · Accreditation in progress. The breast cancer and critical illness insurance module is also available on its own on Thinkific.

Member offer — Scripta Legal

Online legal document packages for personal and business law

Members of Le Conseil

15%

off the base price of Scripta Legal packages

PROMO CODE

LECONSEIL15

Enter the code on the Scripta Legal payment page to activate the offer.

See the member packages

Business Law

- Business start-ups
- Stock option plan kit
- Corporate human resources toolkit
- Shareholder agreements and corporate resolutions
- Offer or sale of a business or company shares
- Offer to lease or commercial lease

Personal Law

- Cohabitation agreement, two wills and two protection mandates
- Estate settlement
- Co-ownership
- Wills and protection mandates before witnesses

LE ÇONSEIL

Thank you for your trust

Precision, ethics and performance, in the service of Quebec's financial services professionals.

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Conseil des professionnels en services financiers — CDPSF