

Interactive Ethics

Ethics training that exceeds expectations.

Interactive Ethics continues the engaging presentations that audiences expect from Candura Group by using polls, games and case studies to keep everyone involved and learning. Attendees participate in an informative and engaging session that teaches the six learning objectives required by CFP Board for ethics training in 2016 through the use of 4 case studies.

1. Define and discuss a financial planning engagement, material elements of financial planning, and the financial planning process.
 2. Analyze specific fact patterns to determine if a financial planning relationship exists.
 3. Differentiate between the standards of care set forth in Rules 1.4 and 4.5 of the Rules of Conduct, and apply each standard of care to specific factual situations.
 4. Apply each Practice Standard set forth in the Financial Planning Practice Standards to a hypothetical financial planning engagement.
 5. Identify the information that must be disclosed to the client in writing by a CFP® professional who is engaged in a financial planning relationship or providing material elements of financial planning.
 6. Define the required information that must be disclosed to clients and prospective clients, when that information must be disclosed, and apply each disclosure requirement to specific factual situations.
- designed and presented by Dan Candura, CFP® -

During the presentation you will be encouraged to use your cell phone, tablet, or other web-based device to participate and interact with fellow participants.

Here's what past participants say about ethics training from Candura Group:

- *In 30 years of taking the Ethics course, this has been the most entertaining and educational. Dan does a fabulous job.*
- *I was skeptical going into this seminar but Dan made a dry subject enjoyable. I'm a CPA as well so I go to lots of CPE seminars. This was one of the best.*
- *The format and presentation was so enjoyable, I did not realize I was learning about ethics. Thank you. It was the highlight of our Symposium.*
- *The way the course is structured makes the 2 hour requirement go quite fast and it provides for enthusiastic engagement by the participants, a rarity in this type of CE course.*