To get the best effect:

* Follow [@JasonWattBCC](https://twitter.com/JasonWattBCC) on Twitter or [Business Career College](https://www.facebook.com/BusinessCareerCollege/) on Facebook.
* Subscribe to the BCC YouTube Channel: [www.youtube.com/user/BCCLLQP](http://www.youtube.com/user/BCCLLQP).
* New resources are being made available all the time.
* Write your practice exams in advance of attending an [Exam Prep seminar](https://www.businesscareercollege.com/collections/bcc-cfp-certification-education-program/products/exam-prep).

Topics that should be studied:

|  |  |  |  |
| --- | --- | --- | --- |
| Date | Topic | Resource | Completed |
| Sept 1 | OAS Basics | <https://www.canada.ca/en/services/benefits/publicpensions/cpp/old-age-security.html> |  |
| 2 | OAS Clawback | <https://retirehappy.ca/minimizing-old-age-security-clawback/> |  |
| 3 | GIS and Allowance | <https://www.canada.ca/en/services/benefits/publicpensions/cpp/old-age-security/guaranteed-income-supplement.html><https://www.canada.ca/en/services/benefits/publicpensions/cpp/old-age-security/guaranteed-income-supplement/allowance.html>  |  |
| 4 | Capacity | <https://hullandhull.com/wp-content/uploads/2015/01/Testing-for-Capacity-and-Undue-Influence-A-Practical-Guide.pdf> (PDF) |  |
| 5 | Monetary Policy | <http://en.wikipedia.org/wiki/Monetary_policy>  |  |
| 6 | Fiscal Policy | <http://en.wikipedia.org/wiki/Fiscal_policy>  |  |
| 7 | Equities | [www.investopedia.com/university/stocks/#axzz25LL7Eg9b](http://www.investopedia.com/university/stocks/#axzz25LL7Eg9b)  |  |
| 8 | Bonds | <http://www.khanacademy.org/finance-economics/core-finance/v/introduction-to-bonds>  |  |
| 9 | Mutual Funds | <http://www.ci.com/web/learningcentre/investmentbasics.jsp?lang=ENG>  |  |
| 10 | Segregated Funds | <https://www.youtube.com/watch?v=TPJ2GT7L-K4&list=PLWbwmSrvI9xYshlJka8O2rD6ZX0v78ziS>  |  |
| 11 | RESP Basics | <http://www.taxtips.ca/resp.htm>  |  |
| 12 | RESP Advanced | <http://www.taxtips.ca/resp/respwithdrawals.htm>  |  |
| 13 | Asset Allocation | <http://www.investopedia.com/exam-guide/series-66/portfolio-management-strategies/asset-allocation-strategic-tactical.asp> |  |
| 14 | Division of Assets at Divorce | <http://www.separation.ca/family-law/division-of-family-assets> |  |
| 15 | Basics of Buy-Sell Agreements | <https://www.youtube.com/playlist?list=PLWbwmSrvI9xaSeLVZsQOZj41E8nKUVWtV>  |  |
| 16 | Cross Purchase Buy Sell |  |
| 17 | Promissory Note Buy Sell |  |
| 18 | Basics of Personal Taxation | <http://www.youtube.com/playlist?list=PLWbwmSrvI9xaGq5xOYZ8GzCINdTBiFi7o> |  |
| 19 | Basics of Investment Taxation | <https://www.youtube.com/watch?v=Up8hYKCkvc0&list=PLWbwmSrvI9xZJKnoD5rf4zLYbbkhaG4h_>  |  |
| 20 | Capital Gains Taxation | <http://www.taxtips.ca/filing/capitalgain.htm>  |  |
| 21 | Spousal Rollovers | <http://people.ucalgary.ca/~law/tutorials/L619/Chapter1_Module6_intro.html>  |  |
| 22 | Mortgage Basics | <http://www.fcac-acfc.gc.ca/Eng/forConsumers/topics/mortgages/Pages/home-accueil.aspx>  |  |
|  23 | Financial Calculator – retirement projections | Chapter 5 & 14 of BCC CFP texts or the appropriate sections in your Core Curriculum materials. |  |
| 24 | Registered Pension Plan Basics | <http://www.fsco.gov.on.ca/en/pensions/pension-plan-guide/pages/pensions-home.html>  |  |
| 25 | Will Basics | <http://cbabc.org/For-the-Public/Dial-A-Law/Scripts/Wills-and-Estates/176>  |  |
| 26 | Intestacy | <http://www.wagnersidlofsky.com/articles/intestacy-in-ontario.php>  |  |
| 27 | Supplement Executive Retirement Plans | <http://www.benefitscanada.com/pensions/db/db-pensions-trends-in-serp-funding-854>  |  |
| 28 | Canada Pension Plan Basics | <https://www.canada.ca/en/services/benefits/publicpensions/cpp.html><http://www.cra-arc.gc.ca/tx/bsnss/tpcs/pyrll/clcltng/cpp-rpc/menu-eng.html>  |  |
| 29 | CPP Changes | <http://www.servicecanada.gc.ca/eng/services/pensions/cpp/changes.shtml>  |  |
| 30 | CPP Disability | <https://www.canada.ca/en/services/benefits/publicpensions/cpp/cpp-disability-benefit.html> |  |
| Oct 1 | DB and DC Plan Basics | <http://www.milliondollarjourney.com/defined-benefit-pension-vs-defined-contribution-pension.htm>  |  |
| 2 | Group Benefits | <http://www.benefitsconsultant.ca/group-benefits/group-life-insurance.html>  |  |
| 3 | Principal Residence Rules | <http://www.taxtips.ca/filing/principalresidence.htm>  |  |
| 4 | Pension Splitting | <http://www.dgfs.ca/Pension_Income_Splitting.pdf> (PDF) |  |
| 5 | Annuities | <http://www.canadalife.com/003/Home/Products/GroupInvestmentProducts/GroupInvestmentsforPlanMembers/PostRetirementSolutions/Annuities/index.htm>  |  |
| 6 | 2017 Insurance tax changes | <https://www.sunnet.sunlife.com/files/advisor/english/PDF/2017_life_insurance_tax_changes_impact.pdf> (PDF) |   |
| 7 | Behavioural Finance | <http://www.investopedia.com/university/behavioral_finance/>  |  |
| 8 | RRSP Basics | <https://www.youtube.com/watch?v=JlwOSH3IyoU&list=PLWbwmSrvI9xYNzuyKOj4xgouodnBp2vHH> |  |
| 9 | RRIF Basics | <http://www.getsmarteraboutmoney.ca/en/managing-your-money/investing/rrifs-and-annuities/Pages/making-withdrawals-from-your-rrif.aspx>  |  |
| 10 | Spousal RRSP and RRIF | <http://www.cra-arc.gc.ca/tx/ndvdls/tpcs/rrsp-reer/wthdrwls/spsl-eng.html>  |  |
| 11 | RRSP at death | <http://www.taxtips.ca/rrsp/taxonrrsprrifatdeath.htm>  |  |
| 12 | Financial Calculator – bond math | <http://www.youtube.com/watch?v=S6PF6y7ICtg>  |  |
| 13 | Operating Companies | <http://sbinfocanada.about.com/cs/startup/a/incorporatadv.htm>  |  |
| 14 | Holding Companies | <http://schwarzlaw.ca/why-create-a-holding-company/>  |  |
| 15 | Life Insurance Basics | <https://www.youtube.com/playlist?list=PLWbwmSrvI9xb8zgasTHDJ660QtGCegLUn>  |  |
| 16 | Universal Life Insurance | <https://www.youtube.com/playlist?list=PLD6723724D80F2994>  |  |
| 17 | US Tax Rules | <http://www.advisor.ca/tax/tax-news/tax-planning-and-dual-citizenship-46794>  |  |
| 18 | SERP II – Retirement Compensation Arrangement | <http://www.westcoast-actuaries.com/information-centre/Supplementary_Plans/Retirement_Compensation_Arrangement.aspx> |  |
| 19 | Home and Auto Insurance Basics | <http://www.ibc.ca/en/> (Use ‘Home’ and ‘Auto’ links) |  |
| 20 | RDSP Basics | <http://www.youtube.com/watch?v=ThQLkVfac4g&feature=share&list=PLWbwmSrvI9xYOUSuOQOZNcw-ug9zNVgY5>  |  |
| 21 | RDSP Grants and Bonds | <http://www.taxtips.ca/disabilities/rdsp/rdsppaymentsin.htm>  |  |
| 22 | Whole Life Insurance | <https://www.youtube.com/playlist?list=PL97876580D3A0DAA1> |  |
|  23 | Statement of PNW | <http://www.klcfdc.com/perStmt.pdf> (PDF) |  |
| 24 | Cash Flow Statement | Chapter 3 of the BCC Core Curriculum or the appropriate sections in your Core Curriculum materials. |  |
| 25 | Power of Attorney | <http://www.duhaime.org/LegalResources/ElderLawWillsTrustsEstates/LawArticle-25/Introduction-to-Powers-of-Attorney-in-Canada.aspx>  |  |
| 26 | TFSA | <http://www.cra-arc.gc.ca/tx/ndvdls/tpcs/tfsa-celi/menu-eng.html?=slnk>  |  |
| 27 | Personal Directives | <https://www.law-faqs.org/alberta-faqs/wills-and-estates-in-alberta/making-a-personal-directive/>  |  |
| 28 | CPP Income Splitting | <http://www.taxtips.ca/seniors/sharecpp.htm>  |  |
| 29 | WCB and EI Basics | <http://www.hrsdc.gc.ca/eng/labour/workers_compensation/index.shtml> <http://www.servicecanada.gc.ca/eng/sc/ei/index.shtml>  |  |
| 30 | Lifetime Capital Gains Exemption | <http://www.thebluntbeancounter.com/2014/09/corporate-small-business-owners-beware.html>  |  |
| 31 | Capital Dividend Account | <https://www.youtube.com/playlist?list=PLWbwmSrvI9xbY0G3SUB-MgV2auF8CccJj>  |  |
| Nov 1 | Critical Illness Insurance | [http://www.sunlife.ca/Plan/Health/Critical+illness+insurance?vgnLocale=en\_CA](http://www.sunlife.ca/Plan/Health/Critical%2Billness%2Binsurance?vgnLocale=en_CA)  |  |
| 2 | Long Term Care Insurance | [http://www.sunlife.ca/Plan/Health/Long+term+care+insurance?vgnLocale=en\_CA](http://www.sunlife.ca/Plan/Health/Long%2Bterm%2Bcare%2Binsurance?vgnLocale=en_CA)  |  |
| 3 | Limited Partnership Investments | <http://marquest.ca/products/prospectus/flowThroughLPs#aboutFlowThroughs>  |  |
| 4 | Individual Pension Plan | <http://gblinc.ca/products-and-services/ipp/individual-pension-plan.html>  |  |
| 5 | Tax Credits – Disabled and Infirm | <http://www.cra-arc.gc.ca/disability/>  |  |
| 6 | Financial calculator – leasing & borrowing | Use Chapters 3 & 5 of the BCC CFP Material or the appropriate sections in your Core Curriculum materials. |  |
| 7 | Tax Credits – Education | <http://www.taxtips.ca/filing/students/tuitiontaxcredit.htm>  |  |
| 8 | Trust Basics | <http://kevinjohnson.articlealley.com/creating-a-trust-in-canada-1002512.html>  |  |
| 9 | Family Trust | <http://www.advisor.ca/tax/tax-news/how-to-keep-splitting-income-with-family-members-in-2018-and-beyond-248833>  |  |
| 10 | Trust Taxation | <http://www.wagnersidlofsky.com/new-tax-changes-to-canadian-trust-rules-means-its-time-to-revisit-your-estate-planning/>  |  |
| 11 | Life Insurance Needs Analysis | BCC Chapter 12 or the appropriate sections in your Core Curriculum materials. |  |
| 12 | Deferred Profit Sharing Plan | <http://www.taxtips.ca/pensions/dpsp.htm>  |  |
| 13 | Partnership Income | <https://professional.sauder.ubc.ca/re_creditprogram/course_resources/courses/content/433/taxation-of-partnerships.pdf> (PDF) |  |
| 14 | Disability Insurance I | <https://www.youtube.com/playlist?list=PL9F2EB54CB8075D7F>  |  |
| 15 | Disability Insurance II | Continue the series begun above. |  |
| 16 | Assuris and CDIC Protection | [http://www.assuris.ca/Client/Assuris/Assuris\_LP4W\_LND\_WebStation.nsf/page/Brochure!OpenDocument&audience=financial](http://www.assuris.ca/Client/Assuris/Assuris_LP4W_LND_WebStation.nsf/page/Brochure%21OpenDocument%26audience%3Dfinancial) <http://www.cdic.ca/Coverage/Pages/default.aspx>  |  |
| 17 | Reverse Mortgages | <https://www.chip.ca/reverse-mortgage-resources/>  |  |
| 18 | Crystallizing the LCGE | <http://www.taxtips.ca/smallbusiness/capitalgainsdeduction.htm>  |  |
| 19 | LPP and PUP | <http://blog.taxresource.ca/is-there-tax-when-i-sell-personal-property/>  |  |
| 20 | Spousal Attribution | <http://www.taxtips.ca/personaltax/attributionrules.htm> <http://www.taxtips.ca/personaltax/incomesplitting.htm>  |  |
| 21 | Farming Succession | <http://www.collinsbarrow.com/uploads/docs/newsletter/national/farm/2016/FarmAlert-June2016.pdf> (PDF) |  |
| 22 | Kiddie Tax | <http://www.advisor.ca/tax/tax-news/beware-the-kiddie-tax-2-56027>  |  |
|  23 | Child Care Benefit | <https://www.canada.ca/en/revenue-agency/services/child-family-benefits/canada-child-benefit-overview.html>  |  |
| 24 | Child Care Expenses | <http://www.taxtips.ca/filing/childcarecosts.htm>  |  |
| 25 | Options | <http://www.khanacademy.org/finance-economics/core-finance/v/american-call-options> <http://www.khanacademy.org/finance-economics/core-finance/v/american-put-options>  |  |
| 26 | Home Buyers and Lifelong Learning Plans | <http://www.cra-arc.gc.ca/tx/ndvdls/tpcs/rrsp-reer/hbp-rap/menu-eng.html?=slnk> <http://www.cra-arc.gc.ca/tx/ndvdls/tpcs/rrsp-reer/llp-reep/menu-eng.html>  |  |
| 27 | Tax Filing at Death | See BCC Chapter 7, 9, and 15 or the appropriate sections in your Core Curriculum materials. |  |
| 28 | Exchange Traded Funds | <https://www.khanacademy.org/economics-finance-domain/core-finance/investment-vehicles-tutorial/mutual-funds/v/exchange-traded-funds-etfs>  |  |
| Nov 29 |   | Exam Day – Good Luck! |  |