The **Business – Finance** diploma program provides students with the knowledge and skills to work in the financial services sector. The financial services sector continues to grow and adapt to the needs of clients through the use of technology. People with customer service skills and knowledge of financial planning, call centre operations, investments and risk management are needed in this fast-paced environment.

Upon completion of this program, you will be able to:

- Help clients take steps to achieve their life goals through an integrated approach to the management of all their financial affairs, including such areas as:
  - Investment Management – assess the nature of the client’s assets based on their risk tolerance, time horizon and expected rates of return
  - Retirement Planning – compare the client’s expected lifestyle in retirement to their current retirement assets and planned savings
  - Tax Planning – assess the client’s current and future tax obligations and strategies employed to minimize or defer taxation

- Insurance and Risk Management – manage the client's exposure to an unexpected financial loss due to death, health issues, property damage and other risks.
- Estate Planning – assess how the client can meet their objectives upon death in the most efficient and cost-effective manner

This Centre for Business program is part of our School of Accounting and Finance.
PROGRAM STANDARDS AND LEARNING OUTCOMES

The graduate has reliably demonstrated the ability to:

1. Process and maintain financial records in compliance with relevant policies, procedures and regulations for individuals and/or organizations.
2. Prepare and present financial information in compliance with relevant legislation and regulations for individuals and/or organizations.
3. Generate financial reports for individuals and/or organizations by applying financial mathematics and statistics.
4. Contribute to the development and the implementation of a financial plan to meet individuals’ and/or organizations’ needs and objectives.
5. Contribute to the development and the implementation of marketing strategies to promote financial products and services and to enhance customer service.
6. Develop and implement strategies to establish and maintain professional networking and business relationships in the finance sector.
7. Analyze, within a Canadian context, the impact of economic variables, legislation, ethics, technology and the environment on individuals’ and/or organizations’ operations.
8. Develop and implement ongoing strategies for personal and professional development, highlighting ethics, values and standards in the finance sector.

REQUIRED COURSES

In order to graduate from the B133 program, you need to complete 27 courses: 24 Mandatory courses and 3 General Education Electives.

Depending on the results of your placement tests, you may be required to take COMM 1003 (English Skills) or CESL 1003 (English Skills-ESL) before progressing to COMM 1007. Similarly, you may be required to take MATH1027 (Business Math with Remediation) before progressing to MATH 1021. COMM1003/CESL 1003 and MATH 1027 do not count towards the 27 courses required for graduation, and you will be charged for these extra courses. Please speak to the Business Office staff if you need any assistance.

General Education Courses (Semester Two, Three and Four): You must complete 4 General Education courses. 1 mandatory (“Successful Social Relations” - GHUM 1087) and 3 chosen from at least 2 of the following categories: Social Sciences (GSSC), Arts and Humanities (GHUM) or Science and Technology (GSCI).

You are required to make up any failed or dropped courses before you are eligible to graduate. You can make up these courses during the year, and some are offered in the evening through Continuing Education. Please check with the Business Office staff to ensure that the Continuing Education courses are equivalent to what is taught in the full-time program. Note that some courses may not be offered in every semester. Our staff can assist you in any special timetable requirements you may have.

GENERAL EDUCATION COURSES

<table>
<thead>
<tr>
<th>Code</th>
<th>Courses</th>
<th>Pre-requisite</th>
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<tbody>
<tr>
<td>BUS 1038</td>
<td>Business Concepts I</td>
<td>NONE</td>
</tr>
<tr>
<td>COMM 1007</td>
<td>College English</td>
<td>NONE</td>
</tr>
<tr>
<td>ECON 1032</td>
<td>Macroeconomics</td>
<td>NONE</td>
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<tr>
<td>FIN 1003</td>
<td>Financial Systems in Canada</td>
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<tr>
<td>MATH 1191</td>
<td>Mathematics of Finance</td>
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<tr>
<td>MARK 1020</td>
<td>Principles of Marketing I</td>
<td>NONE</td>
</tr>
<tr>
<td>GHUM 1087</td>
<td>Successful Relations</td>
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SEMESTER 1

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<tr>
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<tbody>
<tr>
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<td>Successful Relations</td>
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SEMESTER 2

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<tr>
<td>ACCT 1001</td>
<td>Accounting Fundamentals I</td>
<td>NONE</td>
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<tr>
<td>COMP 1010</td>
<td>Business Computer Applications I</td>
<td>NONE</td>
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<tr>
<td>COMM 1034</td>
<td>Professional Communications I</td>
<td>COMM 1007</td>
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<tr>
<td>FIN 1011</td>
<td>Fundamentals of Financial Planning</td>
<td>NONE</td>
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<tr>
<td>PSY 1129</td>
<td>Organizational Behaviour</td>
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Select One General Education Elective

SEMESTER 3

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<tr>
<th>Code</th>
<th>Courses</th>
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<tbody>
<tr>
<td>BUS 1056</td>
<td>Business Presentation Skills</td>
<td>COMM 1007</td>
</tr>
<tr>
<td>FIN 2061</td>
<td>Canadian Investments I</td>
<td>FIN 1011</td>
</tr>
<tr>
<td>FIN 2035</td>
<td>Consumer Behaviour &amp; Financial Needs</td>
<td>MARK 1020</td>
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<tr>
<td>FIN 1035</td>
<td>Retirement Planning</td>
<td>FIN 1011</td>
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<tr>
<td>LAW 1011</td>
<td>Business and Family Law</td>
<td>NONE</td>
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<tr>
<td>STAT 1010</td>
<td>Quantitative Methods I</td>
<td>MATH 1021</td>
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Select One General Education Elective

SEMESTER 4

<table>
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<tr>
<th>Code</th>
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<tr>
<td>FIN 1040</td>
<td>Estate Planning Fundamentals</td>
<td>FIN 1011</td>
</tr>
<tr>
<td>FIN 2062</td>
<td>Canadian Investments II</td>
<td>FIN 1011</td>
</tr>
<tr>
<td>FIN 2063</td>
<td>Insurance in Financial Planning</td>
<td>FIN 1011</td>
</tr>
<tr>
<td>ACCT 2028</td>
<td>Taxation I</td>
<td>ACCT 1001</td>
</tr>
<tr>
<td>FIN 2003</td>
<td>Money Management Software</td>
<td>FIN 1011</td>
</tr>
<tr>
<td>STS 1037</td>
<td>Career Planning &amp; Development</td>
<td>NONE</td>
</tr>
</tbody>
</table>

Select One General Education Elective

General Education Electives

ARTICULATION AGREEMENT

George Brown College has agreements with several universities in Canada, the United States and abroad that will give you credit for your college diploma.
YOUR CAREER

In this program, students obtain the knowledge and skills necessary to pursue careers in the financial services sector. Graduates of the program may be able to find employment as:

- Financial Advisor
- Financial Services Representative
- Customer Service Representative
- Investment Advisor

Note: While the diploma will help you build many of the skills needed in these roles, further designations or credentials may also be required. To learn more about the career possibilities and educational requirements, you may wish to visit the Toronto Financial Services Alliance website at explorefinancialservices.com.

FUTURE STUDY OPTIONS

This two-year diploma has a pathway to the Business Administration – Finance B130/B150 three-year advanced diploma.

The difference between the two-year and the three-year advanced diploma is that the two-year diploma leads to the completion of the core curriculum required to take the QAFP examination, whereas the three-year advanced diploma leads to the completion of the core curriculum required to take the CFP examination. Note: A degree requirement is being introduced to be eligible to become a CFP professional; visit the FP Canada website for more details. If you wish to pursue a degree, visit the B302 Honours Bachelor of Commerce (Financial Services) program.

For more information about the Certified Financial Planner (CFP®) designation, please see the Related Credentials and Certificate section below.

For information on additional future study options, see georgebrown.ca/transferguide.

Related Credentials and Certificate

Graduates of this program may wish to pursue other credentials or certifications in the financial services sector.

Qualified Associate Financial Planner (QAFP®) may be obtained through FP Canada.

Canadian Securities Course (CSC) may be obtained through the Canadian Securities Institute.

Life License Qualification Program (LLQP) may be obtained through Oliver’s Learning (or another approved provider) followed by the Provincial Licensing exam.

Note: The requirements for each designation/certification are set by the granting body, not George Brown College. In order to qualify for any of these designations/certifications, you need to follow the process listed on its website and meet all the requirements applicable to you.
ADMISSION REQUIREMENTS
Applicants are selected on the basis of their academic achievement, including the required courses, and any other selection criteria outlined below.

- Ontario Secondary School Diploma or equivalent**
- Grade 12 English (C or U)
- Grade 11 Math (M or U) or Grade 12 (C or U)

** MATURE STUDENT STATUS (19 YEARS OF AGE OR OLDER AND NO OSSD)
Mature Students may take the Admissions Assessment17 for English and Math, OR may consider upgrading to achieve the credit(s) needed in English18 and Math19.

Please note that George Brown is committed to ensuring that applicants will succeed in their program of choice and meeting the minimum requirements does not guarantee admission to the program. Applicants may be required to have grades higher than the minimum requirements stated.

COURSE EXEMPTIONS
Some college and university credits may qualify you for exemptions. Please visit georgebrown.ca/transferguide for more information.

ENGLISH LANGUAGE PROFICIENCY
Proficiency in English communications is necessary for success in this program.

Please visit georgebrown.ca/englishproficiency for more details

INTERNATIONAL (VISA) STUDENTS
Visit the International Admissions20 page for more information.

APPLY TO
Domestic students should apply through Ontario Colleges21

CONTACT US

INFORMATION SESSIONS
On-campus information sessions are held on a regular basis. Come and have your questions answered. Learn about the program content and career options, meet your friendly professors and staff, and experience what it is like to be in a George Brown College classroom. Sign up for an upcoming session.

DOMESTIC STUDENTS ADMISSIONS
For inquiries about domestic admission requirements, admission deadlines, or the admissions process, please contact the Admissions Office at admissions@georgebrown.ca or visit the Admissions web page.

INTERNATIONAL STUDENT ADMISSIONS
For inquiries about international admission requirements, permits and visas, accommodations, or anything specific to international students, please contact the International Centre at International@georgebrown.ca or visit George Brown International.
Phone: (416) 415-5000 ext. 2115

FINANCIALS/FEES
For inquiries about OSAP, Bursaries, Scholarships and other financial inquiries, please contact the Financial Aid Office at FinAid@georgebrown.ca or visit the Financial Aid web page.

ENTRY ADVISING
For advice on the various program options and which program might be best suited for you, make an appointment to see an Entry Advisor. Please review these frequently asked questions or choose to book your appointment using the link provided.

1. Book online:
   Complete and submit the Client Intake Form
2. Book by phone:

CENTRE FOR BUSINESS
For questions regarding programs at the Centre for Business or if you require more information, please do not hesitate to contact us. Our knowledgeable staff are available to assist you.

For general inquiries, please contact the Centre for Business:
Email: business@georgebrown.ca Phone: (416) 415-5000 ext. 2160

BUSINESS – FINANCE (B133)
For inquiries related to this program (for example, course-specific information) please contact one of the Program Co-ordinators:

Tracey Britt, Program Co-ordinator
Email: tbritt1@georgebrown.ca

or

Carolyn Fallis, Program Co-ordinator
Email: cfallis@georgebrown.ca

Sam Levy, Chair, School of Accounting and Finance
Email: sam.levy@georgebrown.ca

VISIT OUR CAMPUS
This program is offered out of our School of Accounting and Finance28 and classes take place at our St. James Campus29, mainly at 200 King St. E.30, and 290 Adelaide St. E.31, Toronto, ON, Canada.
Campus tours are offered on a regular basis. Sign up32 today! You can also check out our virtual tour33.
George Brown College is continually striving to improve its programs and their delivery. The information contained in this calendar is subject to change without notice. It should not be viewed as a representation, offer or warranty. Students are responsible for verifying George Brown College admission, graduation, and fee requirements as well as any requirements of outside institutions, industry associations, or other bodies that may award additional designations concurrently with, or after completion of, a George Brown College program.