



A Continuous Professional Development Course

Improving CPP Planning for Canadians: *Timing is everything*

Behavioural Insights

Practical

CE Credits

Did you know taking Canadian Pension Plan benefits early, could mean giving up a significant amount of secure retirement income? An opportunity the vast majority of Canadians might be missing out on!

Course Features:

1. Evidence-based learning
2. Practical and actionable content
3. Behavioural insights and real-life examples

Course Length: Five hours

CE Credits:

Five financial planning credits

Introductory price: \$150

This course offers practical guidance and hands-on learning on how you can help your clients increase the security of their retirement income. Through evidence-based techniques, it helps you establish the most favourable time for your clients to apply for their CPP benefits. It also dives into behavioural techniques that enable you to support them through this decision.

It includes key concepts such as the impact of longevity, and human behavioural biases and tendencies on long-term financial wellbeing, providing new insights and strategies to help your clients optimize their retirement income to achieve the ultimate goal of long-term financial security.

This course will enable you to:

1. **Identify core elements of the Canadian Pension Plan**
Key factors that impact CPP decisions in the current environment
2. **Understand the role of longevity in CPP timing decisions**
Approaches to using longevity data and assumptions to consider when advising on CPP decisions
3. **Evaluate CPP deferral opportunities**
Evidence-based approaches to assess when clients should apply for their CPP benefits
4. **Improve client outcomes**
Strategies and techniques to address common human biases and tendencies

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