

## **RE: IFSE Institute Launch of the Accredited Investor and Offering Memorandum Exemption Case Study**

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IFSE Institute is pleased to announce the launch of its new ***Accredited Investor and Offering Memorandum Exemption Case Study***. This new educational offering has been developed for professionals who participate in the exempt market in Canada and those who want to learn about the accredited investor (AI) and offering memorandum (OM) exemptions. The learning objectives of the case study focus on the criteria that investors must meet in order to qualify to purchase exempt market securities under these exemptions.

The ***Accredited Investor and Offering Memorandum Exemption Case Study*** is comprised of the following components:

1. The Learning Module
2. The Case Study
3. The Case Study Questions

At the end of the case study, students will be able to:

- perform the analysis and complete the financial tests required to determine an investor's net income, net financial assets, and net worth
- determine whether an investor qualifies as an accredited investor under the AI exemption
- determine whether an investor qualifies as an eligible investor under the OM exemption
- determine the maximum allowable investment permitted in exempt securities in each jurisdiction
- determine the maximum investment amount that an investor can invest in exempt securities, given their eligibility and jurisdiction

The cost is \$30 (+ taxes). To register, visit [www.ifse.ca](http://www.ifse.ca).

**For more information:**

Christina Ashmore  
Managing Director, IFSE Institute  
905.366.0827  
[cashmore@ifse.ca](mailto:cashmore@ifse.ca)

**About IFSE Institute**

IFSE is the educational arm of The Investment Funds Institute of Canada (IFIC) and is dedicated to helping Canadians improve their financial literacy by providing best-in-class financial education and support for individuals, firms, and academic institutions. IFSE is a proven leader in financial services training, entrusted by the regulators to be an approved education provider to the Canadian financial services industry. IFSE is a not-for-profit organization that has been creating high quality, innovative learning solutions since 1967. For more information, visit: [www.ifse.ca](http://www.ifse.ca)