

Karen Sharon Chartrand,

Course	Course Title	Status	Access Expires
MGF0715	Adding Value to Estate Planning with Life Insurance	Completed	
MGF0735	Tax Strategies for Business Owners	Completed	
MGF0711	How Insurance Fits into a Tax Efficient Order of Investing	Completed	
MGF0712	Creating New Money to Fund Insurance Needs	Completed	
MGF0714	Borrowing to Fund Insurance Needs	Completed	
MGF0721	Debt Management: Using Insurance as a Backstop	Completed	
MGF0722	Principal Residences: Protecting your Investment	Completed	
MGF0723	Wealth Preservation with Real Estate	Completed	
MGF0724	Impact of Insurance with Cottage Succession Planning	Registered	
MGF0725	Strategies on Owning Property in the US	Completed	
MGF0731	Accident and Sickness: Planning for Incapacity	Completed	
MGF0732	Wealth Strategies with Insurance: Planning Ahead	Registered	
MGF0733	Tax Efficient Capital Planning	Completed	
MGF0734	Planning for Business Succession	Completed	
MGF0713	Insurance Solutions for the Family Business	Completed	
MGF0633	Trusts: Basic Tax Treatment	Completed	

MGF0622	Helping Families with CRA Obligations at Death	Completed
MGF0612	Planning and Real Wealth Management	Completed
MGF0613	Matching Products and Services to Family Business Needs	Completed
MGF0614	Ideal Timelines: The Priorities Pyramid	Completed
MGF0615	The Succession Mapping Process	Completed
MGF0621	Death and Taxes	Completed
MGF0623	Buffering Tax on Final Income with Insurance Solutions	Completed
MGF0624	Preserving the Value in Capital Assets at Death	Completed
MGF0625	Dispositions of Registered Accounts at Death	Completed
MGF0632	Trusts as Mechanisms to Exert Control	Completed
MGF0611	Understanding Family Dynamics	Completed
MGF0634	Insurance and RRSP Trusts	Completed
MGF0635	Spousal Trusts	Completed
MGF0631	Basic Trust Mechanics	Completed
MGF0522	Charity Law and Taxes	Completed
MGF0511	Understanding the Family Business	Completed
MGF0512	Working in Alignment with your Family Business Clients	Completed
MGF0513	Developing a Shared Vision	Completed
MGF0514	Structuring Retirement Income	Completed
MGF0515	Advising Family Businesses	Completed
MGF0521	Why Philanthropy?	Completed
MGF0524	Gifts of Life Insurance	Completed
MGF0525	Integrating Philanthropy into Your Practice	Completed
MGF0531	Taxation of Income from a Proprietorship	Completed

MGF0532	Transactions Involving Business Assets	Completed
MGF0533	Home-Based Businesses	Completed
MGF0535	Professionals and Partnerships	Completed
MGF0523	Gift Plan Strategies	Completed
MGF0534	Disposing of and Replacing a Business	Completed
MGF0433	Planning for Survivors	Completed
MGF0412	Real Estate	Completed
MGF0413	Principal Residences	Completed
MGF0414	Tax Efficient Debt Management	Completed
MGF0415	Risk Management	Completed
MGF0421	Residency	Completed
MGF0422	Immigration and Emigration	Completed
MGF0423	Snowbirds	Completed
MGF0424	Foreign Property Ownership	Completed
MGF0425	US Citizens in Canada	Completed
MGF0432	At Death and Beyond	Completed
MGF0434	Business Owners and Executives	Completed
MGF0435	Strategic Philanthropy	Completed
MGF0411	Tax Efficient Asset Transfers: Managing ACBs	Completed
MGF0431	Planning for Post Retirement Incapacity	Completed