



For immediate release

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CLU Institute unveils new name, logo and website

Toronto - The CLU Institute today unveiled a whole new look. Effective immediately, The CLU Institute will be known as The Institute for Advanced Financial Education. Along with the new name comes a new logo and website. This change marks the next step in the evolution of The Institute as a specialized designation-granting and standards-setting body for financial services practitioners in Canada.

“With the decision to offer the CLU designation to the broader financial services industry, it was a good time to step back and look at how we are positioned in the industry. The Institute, as with most organizations, does this on a regular basis,” said Greg Pollock, COO of The Institute for Advanced Financial Education. “The look of the website and the logo that we are unveiling today is more contemporary and the name better reflects who we are and what we do. I know that it will resonate with our current and new audiences.”

The new logo was designed to reflect dignity and strength. The “I” in the centre of the green circle represents an individual belonging to a community. The stylized sun, also in the green circle, symbolizes growth and power.

Also going live today is The Institute’s website, www.iafe.ca. The new website is streamlined and easy to navigate.

“These changes represent a significant step forward in the development of The Institute’s role as provider but also guardian of specialized financial designations,” continued Mr. Pollock, who also noted that The Institute continues to be a part of the family of Advocis, The Financial Advisors Association of Canada. “I know that financial advisors and planners already benefit from holding The Institute’s designations and taking Institute-approved continuing education. As always, though, the greatest benefit will be realized by the Canadian consumer.”

Rick McKenster, Chair of The Institute Board, added that the new name and look “better represents The Institute’s commitment to designation standards, knowledge and competency. The Institute’s new direction will enhance the state of financial advice in Canada. This is very exciting news for the industry.”

For more information, please visit The Institute's new website at www.iafe.ca.

The Institute for Advanced Financial Education is the professional standards body for financial practitioners holding the CLU and RHU designations in Canada. The Institute is responsible for administering a Code of Professional Conduct for its designation holders and Advocis members. The Institute also offers continuing education accreditation services for education providers that ensure their learning programs have met a clear standard of educational quality and relevance. CLU- and RHU-designated practitioners are specialists in living benefits, tax, life insurance, estate planning and business succession solutions.

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