

*In order for a program to be accredited by The Institute, it must meet all 7 decision criteria below.*

## Accreditation Decision Criteria

**1) The proposed program is appropriate for the audience it is targeting.**

**2) Learning objectives are well written.**

Provide clear statements of what the audience is expected to learn from the training program or self-directed learning. These statements can describe either what trainees are expected to be able to do or how trainees are expected to behave.

**3) Program content must be directly linked to the *Practice Guidelines for Financial Advisors & Planners*.**

Full program materials must be provided in order for us to conduct our review and confirm links to practice competencies and/or practice behaviours.

**4) Instructional and learning materials are relevant for the training program.**

**5) Delivery format is well described.**

Provide a clear and complete description of the training methods (ie. delivery format, or self-directed learning procedures).

**6) Program completion requirements are explained.**

Provide a clear description of procedures for confirming participation/attendance in training or for completion of self-study. Where tests are used, you need to provide test questions and answers.

**7) Contact time is appropriate and clearly documented.**

Provide clear documentation and/or explanation of the contact time (ie. detailed agenda). Programs must be at least 30 minutes in duration to be accredited. Incremental times will be awarded by the quarter hour (every 15 minutes of contact time) accordingly. If a program is accredited, the number of credit hours will be based on contact time for activities that qualify.