

## Chartered Investment Manager (CIM®)

The Chartered Alternative Investment Analyst designation is awarded by the Canadian Securities Institute. The Chartered Investment Manager (CIM®) designation is the industry educational standard for discretionary investment and portfolio management services. It is recognized by Canadian securities regulators as meeting the proficiency requirements for those applying for approval in a portfolio management registration category. To qualify for the CIM® designation, you must meet the following work experience requirements which are verified:

- Two (2) years of relevant work experience must have been gained within the last 5 years.
- Candidates may have gained the experience in either a retail or an institutional role or in a role that relates to, supports, or adds value to the investment management process.
- Work experience may be applied if it is gained outside of Canada and meets the requirements. CSI may request further documentation for confirmation purposes.
- Managing personal investments or those of family or friends does not qualify for work experience.

While the above requirements must be met by all applicants, the assessment of experience will be applied based on the candidate's role as either (1) Investment and/or Financial Advisors and Portfolio Managers or (2) Professionals Supporting the Investment Management Process.

In order to maintain the designation, CIM® holders must adhere to the Code of Ethics and meet the continuing education requirement of 20 hours every two years.