

Investor Education Resources



The Basics of Investing

An introduction to basic investing that includes information on establishing investment objectives, understanding risk tolerance and the importance of a diversified portfolio. An ideal educational tool for the general public.

Price: 50¢ per brochure



Choosing Your Financial Advisers

Guidelines to assist individuals select the right adviser, including a list of investor responsibilities and what to expect from an adviser and the regulators.

Price: 50¢ per brochure



Mutual Funds: What You Need to Know

A mutual fund primer outlining the different types of mutual funds, the advantages and disadvantages of mutual fund investing, as well as clarifying fees, commissions and how the industry is regulated.

Price: 85¢ per brochure



Investing and the Internet: Be Alert to Signs of Fraud

Cautionary information about online investing, including questions to ask and how to protect against cyber-fraud.

Price: 45¢ per brochure



The Prospectus: Being Informed is Being Protected

A guide explaining what makes up a prospectus, why it should be read, the kind of information it contains and how it protects investors.

Price: 45¢ per brochure



Protecting Your Finances: How to Avoid Investment Frauds and Scams

Concrete tips for seniors on how to safeguard their hard-earned savings from investment scam artists.

Price: 60¢ per brochure



Investment Planning Worksheet

Designed to help advisers and clients establish clear goals, identify resources and understand risk, this worksheet helps map out an overall investment strategy.

Price: 50¢ per brochure



When Your Broker Calls, Take Notes

A handy sheet on which clients can record details of conversations and transactions with their adviser.

Price: Free



Characteristics of Various Types of Securities

A securities overview including common types, liquidity, expected return and risk. This colourful wall poster makes an excellent resource for teachers.

Price: \$1.60 per poster



Con Man: Looks Can Be Deceiving

Investment fraud scenarios are summarized on this striking wall poster.

Price: Free



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