



The Canadian Institute
of Financial Planning



IFP CASE CHALLENGE 2023

WESTERN REGIONAL - MARCH 25th



Thank you to our Presenting Sponsor!



CIFP CASE CHALLENGE 2023

PRESENTED BY



CIFP Case Challenge Overview

The CIFP Case Challenge is meant to provide students with an opportunity to take what they have learned in their financial services programs and demonstrate their financial planning acumen. The CIFP Case Challenge will give students an opportunity to: interact effectively in team situations, analyze real business and financial planning problems, develop appropriate solutions, and present these solutions to a panel of financial services professionals.

The CIFP Case Challenge intends to raise the profile of entry-level practitioners who are graduating from Financial Planning Certification programs within the public college and university systems. It is a forum where sponsoring organizations can network with students to discover performance-tested individuals in practical and applied financial planning. Sponsoring organizations will be able to see these students in action and have access to the best and most qualified pre-graduates in financial planning from across Canada.

Special thanks to the 2023 CIFP Case Challenge organizing committee:

Anthony Williams
Gauri Seth
Justin Warren
Andrew Cunningham

It was their hard work and dedication that made this great event possible!



**The Canadian Institute
of Financial Planning**

March 25th, 2023

Dear Competitor,

On behalf of the Canadian Institute of Financial Planning, welcome to the 2023 CIFP Case Challenge – Western Regional.

As future financial services professionals, we are pleased to provide you with this opportunity to demonstrate and reinforce your financial planning skills in a context that will exemplify what you will discover in the real world. We have provided you with a stage where financial services professionals will assess you. We know that you and your teammates will give accurate and creative strategies for your client's needs.

We anticipate that you will use this opportunity to enjoy the friendly competition among fellow students and meet new people and foster new connections to build upon your network of contacts. Developing a network of peers will help you understand the industry better and help others while promoting the high standards of financial services education. Enriching your future clients' lives through financial planning is a rewarding and honourable profession, which the Canadian Institute of Financial Planning is happy to be a part of.

Please take this opportunity to enjoy and have fun while continuing to increase your knowledge and experience.

We wish you the best of luck.

Regards,

A handwritten signature in black ink, appearing to read 'Keith Costello', is displayed within a white rectangular box.

Keith Costello
President & CEO
The Canadian Institute of Financial Planning

CIFP Case Challenge Rules and Regulations

1. The CIFP Case Competition is open to post-secondary students who are in Financial Services programs at a Canadian college or university.
2. Schools may enter up to two teams into the competition, with each team being comprised of no more than three students.
3. A “student” for the purposes of this competition, must possess a valid student card and must be enrolled in a full-time Financial Services program at their post-secondary institution.
4. A “coach” for the purposes of this competition must be a faculty member currently teaching in the designated program area.
5. Teams are not allowed any notes, cell phones or other mechanical devices during the period of sequestration and will be required to use their own laptop computer. During the time of sequestration, they may have scrap paper, pens/pencils and a non-programmable financial calculator. Drinks and snacks will also be permitted during the time of sequestration.
6. Cases will be of a strategic financial planning orientation and will be provided to each team as they enter their sequestration room.
7. Teams will have two and a half hours to complete their case analysis and put together their presentation. If a team finishes early and does not want to use their full allotment of time, they must notify the person monitoring their zoom breakout room and submit their presentation.
8. If a team is late arriving at their sequestration room, they will be disqualified.
9. The time allocated for each team presentation is up to twenty minutes. If a team has not completed their presentation during that time period, they will be interrupted and prevented from continuing. This will result in a mark deduction from the judges.
10. There will be a five to ten-minute period after the presentation, during which judges may ask questions of the team members about their presentation.
11. Any team caught cheating will be disqualified from the 2023 competition, and the school that they represent will also be forced to miss the 2024 CIFP Case Challenge. A note will also be placed on the CIFP Case Challenge Website indicating that the school was disqualified.

Schedule of Events

Mountain Time

Start	Finish	Event
8:45 am	9:00 am	Registration
9:00 am	9:30 am	Team Orientation Meeting
9:45 am	1:45 pm	Teams Sequestered <i>(2.5 hours per team, staggered start)</i>
12:30 pm	2:30 pm	Team Presentations <i>(30 minutes per team, staggered start)</i>
2:30 pm	2:45 pm	Judges Deliberate
2:45 pm	3:15 pm	Awards Ceremony

The team sequestered and presentation times are randomly selected during the team orientation meeting. Based on the selection they are:

Start	Finish	Event
		Selection 1
9:45 am	12:15 pm	Team Sequestered
12:30 pm	1:00 pm	Team Presentation
		Selection 2
10:15 am	12:45 pm	Team Sequestered
1:00 pm	1:30 pm	Team Presentation
		Selection 3
10:45 am	1:15 pm	Team Sequestered
1:30 pm	2:00 pm	Team Presentation
		Selection 4
11:15 am	1:45 pm	Team Sequestered
2:00 pm	2:30 pm	Team Presentation

Participating Schools



Team 1

Rylee Wilson
Samson Duborg-Rankin
Adam Sveinson
Coach: Tony Wrobel



Team 2

Tommy Pham
Evan Todd
Freshta Khidri
Coach: Hardeep Gill
Coach: Thomas Varghese

Team 3

Nathan Cooper
Tanner Wilkie
Adam Klay
Coach: Hardeep Gill
Coach: Thomas Varghese



Team 4

Deanna Wan
Jasmohit Kaur
Christine Ip
Coach: Christy Hemmingway

Competition Alternates

The following is a list of students who participated in the 2023 CIFP Case Challenge as alternates for their respective schools. We wanted to thank these individuals for their dedication to the event and hope to see them as participants in the future.

Samantha Roxas – *Bow Valley College*
Britany Medina – *SAIT*

Judges

Knut Larsen, cand.oecon., CFP®, RRC®
Partner – Brigus Learning Inc.

Anthony Williams, CFP®, RRC®
*Vice President, Academic Affairs –
The Canadian Institute of Financial Planning*

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