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## **CISI Investment Funds in Canada (IFC) Exam Sample Questions (Q61-Q66):**

### **NEW QUESTION # 61**

A husband wishes to transfer some of his non-registered mutual fund holdings to his wife, but wants to maintain trading authority over the transferred assets. He also wishes to ensure that should she die, the gift he is making will revert to him. What is the appropriate account type?

- **A. Open a joint account**
- B. Open an account in his wife's name only
- C. Open a tenants in common account
- D. Open a nominee account

**Answer: A**

Explanation:

Comprehensive and Detailed Explanation From Exact Extract:

A joint account allows the husband to retain trading authority and includes the right of survivorship, ensuring the assets revert to him if his wife dies. The feedback from the document states:

"The husband would have no financial interest in a client name account, registered in his wife's name only. A nominee account would transfer trading authority to a dealer or third-party administrator. In a tenants in common account, each spouse would have trading authority over his/her portion of the account. Therefore, the husband's best option would be to open a joint account and retain full trading authority. A joint account would also offer the right of survivorship, which is not a feature of a tenants in common account."

Reference:Chapter 17 - Mutual Fund Dealer Regulation Learning Domain:Ethics, Compliance and Mutual Fund Regulations

### **NEW QUESTION # 62**

Jasmine received an inheritance from her grandmother of \$10,000. She wants to invest her money wisely. She has seen in the news that a particular energy company is doing very well and has good prospects. She has also seen how volatile its share price has been in the last year. She knows the risks of the resource sector and wants to invest but is not comfortable with so much volatility. Which of the following mutual fund benefits would address her concern?

- **A. diversification**
- B. convenience
- C. liquidity
- D. low cost

**Answer: A**

Explanation:

Diversification is the mutual fund benefit that would address Jasmine's concern about volatility.

Diversification means spreading investments across different asset classes, sectors, regions, and companies to reduce risk and volatility. A mutual fund provides diversification by pooling money from many investors and investing in a portfolio of securities that meet the fund's investment objective and strategy. By investing in a mutual fund, Jasmine can gain exposure to the energy sector without putting all her money in one company.

She can also benefit from the professional management and research of the fund manager, who can select and monitor the best securities for the fund. References: Mutual Funds, Diversification

### **NEW QUESTION # 63**

A self-directed investor bases stock purchase decisions on internet recommendations and stock tips, believing this provides the most accurate information. What is the investor's behavioural bias?

- **A. Availability**
- B. Endowment
- C. Overconfidence
- D. Representativeness

**Answer: A**

Explanation:

The availability bias occurs when investors rely on easily available or recent information rather than a thorough analysis. In this case, the investor bases decisions on internet recommendations and stock tips, believing they are accurate, instead of analyzing fundamentals. This clearly matches availability bias.

Endowment bias applies when investors overvalue what they already own.

Representativeness bias applies when investors judge outcomes by stereotypes or past patterns.

Overconfidence refers to excessive faith in one's own knowledge.

Thus, the behavioural bias here is Availability .

#### NEW QUESTION # 64

Sarah and Kyle are a married couple. They are both 34 years of age and work as teachers. Their combined annual income is \$130,000. They are able to save \$800 each month. They own a home worth

\$340,000 with a \$120,000 mortgage. Since they work for the same employer, they have the same defined benefit pension plan.

Other than a tax-free savings account (TFSA) in Kyle's name with \$5,000, they do not have any other assets.

They are avid sailors and want to save towards a purchase of a sailboat. For the type of sailboat they want, they estimate it should cost around \$65,000. They want you to recommend an investment for their monthly savings to help them achieve their goal faster.

What question should you ask them next?

- **A. What is your investment objective for these savings?**
- B. How much do you make individually each year?
- C. How would you feel if you lost part of your money in the short-term?
- D. What is your net worth?

**Answer: A**

Explanation:

According to the Canadian Investment Funds Course, an investment objective is the goal or purpose of investing money. An investment objective reflects the investor's desired return, risk tolerance, time horizon, and liquidity needs. An investment objective is one of the key components of the know-your-client (KYC) information that a mutual fund representative must obtain and update from a client. The KYC information helps the representative to assess the suitability of any investment recommendation or trade instruction for the client<sup>2</sup> In this case, Sarah and Kyle are a married couple who want to save towards a purchase of a sailboat. They are able to save \$800 each month and have a tax-free savings account (TFSA) in Kyle's name with \$5,000. They want you to recommend an investment for their monthly savings to help them achieve their goal faster. Before you can make any recommendation, you need to gather more information about their investment objective for these savings. You need to know how much return they expect, how much risk they are willing to take, how long they plan to invest, and how easily they want to access their money. These factors will help you to determine the most suitable investment option for them.

Therefore, the question you should ask them next is C. What is your investment objective for these savings?

1: Canadian Investment Funds Course - IFSE Institute 3 (Unit 2: Know Your Client) 2: Canadian Investment Funds Course - IFSE Institute 4 (Unit 10: Portfolio Management)

#### NEW QUESTION # 65

Which of the following transactions takes place in the secondary market?

- A. Issue of new debt and equity securities
- **B. Resale of previously issued securities**
- C. Issue of federal Treasury bills
- D. Sale of mutual funds

**Answer: B**

Explanation:

Comprehensive and Detailed Explanation From Exact Extract:

The secondary market involves trading previously issued securities between investors, enabling liquidity for those who initially purchased the securities. The feedback from the document states:

"The secondary market involves the resale of previously issued securities between investors. It enables investors who originally bought the investment products to sell them and obtain cash." Reference:Chapter 2 - Overview of the Canadian Financial Marketplace Learning Domain: An Introduction to the Mutual Funds Marketplace

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