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## Practice Test

With Answer Key

### Investment fund In Canada (IFIC)

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### CISI IFC Exam Syllabus Topics:

Topic	Details
Topic 1	<ul style="list-style-type: none"><li>The Know Your Client Communication Process: This domain focuses on gathering and documenting client information to ensure suitable recommendations, including understanding financial situations, investment objectives, risk tolerance, and maintaining ongoing communication with clients.</li></ul>
Topic 2	<ul style="list-style-type: none"><li>Evaluating and Selecting Mutual Funds: This domain covers the systematic process of choosing appropriate mutual funds based on client needs, including selection criteria, cost considerations, performance history, and ongoing portfolio monitoring and rebalancing.</li></ul>
Topic 3	<ul style="list-style-type: none"><li>Introduction to the Mutual Funds Marketplace: This domain covers the structure of Canada's mutual fund industry, including key participants like manufacturers, distributors, and regulators, along with distribution channels and the regulatory framework governing the industry.</li></ul>

Topic 4	<ul style="list-style-type: none"> <li>Understanding Alternative Managed Products: This domain introduces investment products beyond traditional mutual funds, including ETFs, segregated funds, and hedge funds, examining their features, structures, benefits, risks, and regulatory treatment.</li> </ul>
Topic 5	<ul style="list-style-type: none"> <li>Analysis of Mutual Funds: This domain addresses evaluation tools and techniques for mutual fund performance, including quantitative measures like returns and risk metrics, and qualitative factors like manager experience and investment style.</li> </ul>
Topic 6	<ul style="list-style-type: none"> <li>The Modern Mutual Fund: This domain examines mutual fund structures, types, and operations, covering equity, fixed income, balanced, and specialty funds, their legal structures, pricing mechanisms, purchase processes, and associated fees.</li> </ul>

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## CISI Investment Funds in Canada (IFC) Exam Sample Questions (Q258-Q263):

### NEW QUESTION # 258

What is an example of an indirect investment?

- A. A couple purchases a corporate bond.
- B. A couple uses their savings to start a business.
- C. A couple purchases their first home.
- D. A couple pays their granddaughter's tuition.

**Answer: A**

### NEW QUESTION # 259

Which of the following asset allocation statements is correct?

- A. You should review a client's asset allocation when the investment environment changes
- B. Equity weightings greater than 90% should not be recommended
- C. A fixed income component of less than 25% is appropriate for conservative portfolios
- D. Portfolio security selection determines the long-term growth potential

**Answer: A**

Explanation:

Asset allocation should be reviewed when the investment environment changes to ensure it remains suitable for the client's objectives. The feedback from the document states: "In general terms, an equity weighting of less than 25% is considered conservative and more than 75% is considered aggressive. Only if the client is very aggressive should the weighting of his equity component reach 90%." Reference: Chapter 8 - Constructing Investment PortfoliosLearning Domain: Understanding Investment Products and Portfolios

### NEW QUESTION # 260

As it pertains to fixed-income securities, which yield metric factors in cash flows relative to ongoing bond prices rather than the initial amount invested?

- A. Current
- B. Effective
- C. Dividend
- D. Earnings

**Answer: A**

#### **NEW QUESTION # 261**

Natasha currently owns 2 mutual funds: a bond fund and a Canadian equity fund. She would like to use one of them as her registered retirement savings plan (RRSP) contribution for the year. From a tax efficiency perspective, which mutual fund should she contribute?

- A. the bond fund
- B. either since it makes no difference
- C. it depends on her marginal tax rate
- D. the equity fund

**Answer: A**

Explanation:

The bond fund should be contributed to Natasha's RRSP from a tax efficiency perspective, because interest income from bonds is fully taxable at her marginal tax rate outside of an RRSP. By contributing the bond fund to her RRSP, Natasha can defer paying tax on the interest income until she withdraws it from her RRSP in retirement, when she may be in a lower tax bracket. The equity fund should be kept outside of her RRSP, because dividends and capital gains from equities receive preferential tax treatment compared to interest income. Dividends qualify for the dividend tax credit and capital gains are only 50% taxable. Furthermore, equities tend to have higher returns than bonds over the long term, which means that Natasha would have more after-tax income by keeping them outside of her RRSP. References: Registered Retirement Savings Plan (RRSP), Does it pay to invest in an RRSP? Here's the math

#### **NEW QUESTION # 262**

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. What is your net worth?
- D. How would you feel if you lost part of your money in the short-term?

**Answer: A**

Explanation:

The question that you should ask Sarah and Kyle next is what is their investment objective for these savings.

An investment objective is a statement that defines the purpose and goals of an investment. It helps investors and advisors select suitable investment products and strategies that match the investor's needs and expectations. An investment objective typically considers factors such as risk tolerance, return expectations, time horizon, liquidity needs, tax situation, and personal preferences. Therefore, option B is the correct question to ask Sarah and Kyle next. The other options are not relevant or sufficient to determine their investment objective. Option A is related to their risk tolerance, but it is not the only factor that affects their investment objective. Option C is related to their net worth, but it does not indicate their purpose and goals for their savings. Option D is related to their income, but it does not reflect their return expectations or liquidity needs for their savings. References: [Investment Objective Definition], [Investment Objectives: What They Are and How to Use Them], [Investment Objectives | GetSmarterAboutMoney.ca]

#### **NEW QUESTION # 263**

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