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FINANCIAL SERVICES LTD.

## April 2022 eFORUM

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Welcome to **eFORUM**  
**PFA**

The Professional Financial Advisor  
Designation Program  
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Advocis

Created by the editorial team of *FORUM* magazine, eFORUM delivers Advocis members content they can use in their everyday communications with clients. Designed to inform and help advisors, eFORUM features practice management, insurance, tax, and estate planning strategies. Look for eFORUM in your inbox four times a year.

Please send any feedback to **Deanne Gage**, Editor, FORUM Magazine.



## Returning to the Office: What's Right for Your Team?

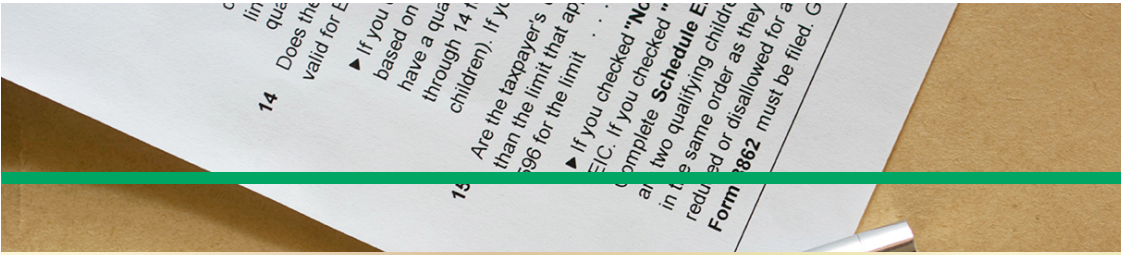
By Kelly Maxwell

April 13, 2022

As the easing of pandemic restrictions continue, advisors are also contending with the idea of going back to the office.

This isn't to say that all advisors have been working remotely for the past few years. Our coaches have seen advisor clients back in the office for quite some time, but staying remote with clients. On the other hand, for many advisory teams, especially in Ontario, they have worked remotely for the majority of the pandemic. Going back to the office will be a big change again. [...] [Read more](#)

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## What the New Title Protection Law Means for You

By Vikram Barhat  
April 13, 2022

The long overdue regulation of ?financial advisor? (FA) and ?financial planner? (FP) titles has come into effect, as of March 28. The regulation grants the regulator enforcement authority over individuals for unapproved use of restricted titles.

The new regime dictates that the two titles are restricted to those who hold recognized credentials from an approved recognized credentialing entity. ?Using a restricted title without a registered credential is now against the law,? said Greg Pollock, president and CEO of Advocis, speaking at an Advocis webinar. [...] [Read more](#)