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INSTITUTE OF ADVANCED FINANCIAL PLANNERS

PRESS RELEASE

Team from Dalhousie University Wins Financial Planning Competition *Unlocking Financial Literacy for the Next Generation*

VANCOUVER, June 15, 2020 - The Institute of Advanced Financial Planners (IAFP) is pleased to announce the results of the Sixth Annual Student Financial Planning Competition.

The winning team is from Dalhousie University, consisting of Rowe School of Business students Shana Srikaruna and Sasha Paikin.

"As a student, the concept of unlocking financial literacy for a younger generation is very close to home. Many people my age or even ten years my senior could benefit from the solution we have devised, and we thank the IAFP for giving us the opportunity to present it."

- Sasha Paikin, Fourth Year Dalhousie Bachelor of Commerce, Co-op Student

The competition was open to teams of current post-secondary students who are interested in careers in financial services. This year's topic was "Unlocking Financial Literacy for the Next Generation." This topic sparked immediate interest by students across the country as they see first-hand financial literacy issues as a significant barrier among their peers.

Teams submitted a two-page presentation outline and a three to five-minute promotional video. The winning team will give a 45-minute interactive presentation to financial planners and industry representatives at the opening of the IAFP's annual symposium on October 21, 2020. This year's event will be a virtual event due to COVID 19.

"Preparing for the student competition topic that delves into financial literacy for the next generation was a real eye-opener. My research allowed me to analyze my own shortcomings, and see how much information is out there when you're looking for it. We are extremely grateful to IAFP for granting us the opportunity to share our perspectives and solution at this year's symposium!"

- Shana Srikaruna, Fourth Year Dalhousie Bachelor of Commerce, Co-op Student

The IAFP is pleased that this competition gives post-secondary students professional development and networking opportunities and more exposure to the profession of financial planning.



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About the Institute of Advanced Financial Planners (IAFP)

The Institute of Advanced Financial Planners and its hallmark professional designation, the R.F.P.® (Registered Financial Planner®) represent the highest standard of excellence in the competency of financial planning. The Institute exists to provide a level of assurance and peace of mind to the public when they are seeking advisors capable of delivering advanced financial planning solutions.

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