

The CE credit handbook for Advisor Learning Navigator

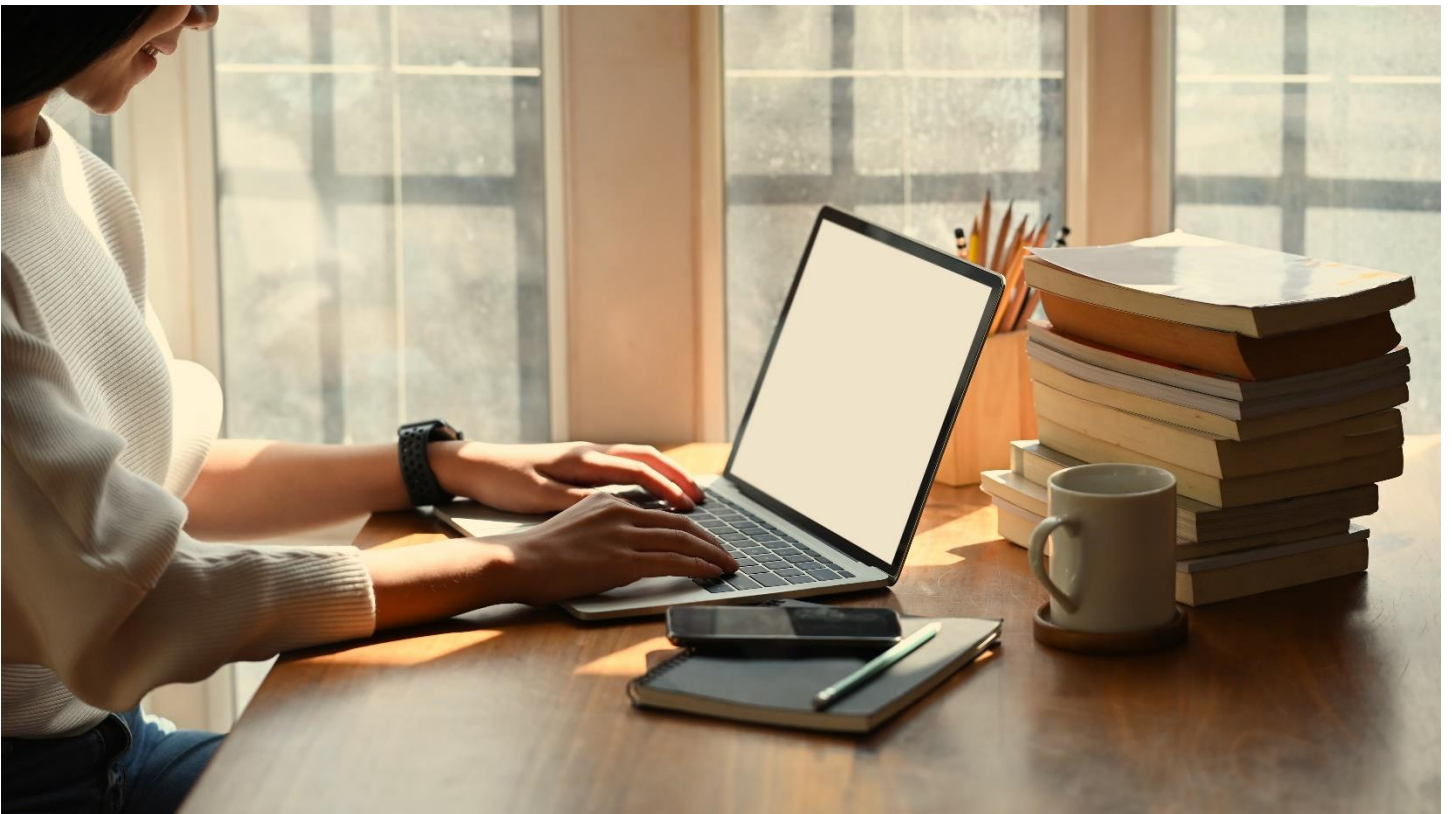


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What are continuing education (CE) credits and what is required to earn them?

A continuing education credit (CEC) is a measure used in continuing education programs to assist professionals to maintain their license in their profession.

Continuing Education (CE) credits are awarded to recognize training activities related to licensing and designations granted by provincial regulators, institutes, and councils.

Insurance professionals with Life and/or A&S licences must:

1. Track their own CE credits
2. Keep records of completed courses
3. Manage any carry-over credits
4. Meet CE requirements to renew licences and designations

Continuing education (CE) credits are designed to promote ongoing professional development to help stay current with industry knowledge. To support this goal, CE certificates for accredited courses on Advisor Learning Navigator are issued only upon the initial completion of a course. While you may choose to repeat courses, CE hours should only be reported once. Additional CE certificates will not be provided for subsequent completions. CE certificates for activities completed with Sun Life, can be found on the [Advisor Learning Navigator](#) platform.

Sun Life Continuing Education Team

Our team accountabilities:

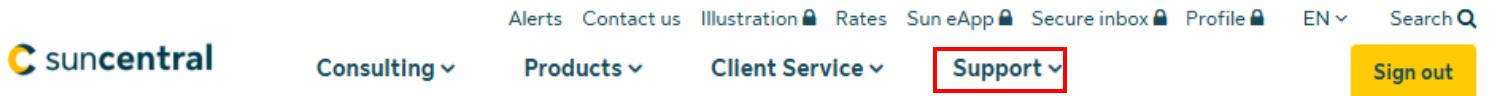
1. Partner with content creators and subject matter experts.
2. Review content for CE credit eligibility.
3. Submit individual applications for accreditation to various insurance councils.
4. Create and issue CE certificates for all areas of business.
5. Ongoing engagement and relationship building with regulators.

These tasks help ensure advisors earn valuable credits that align with industry standards.

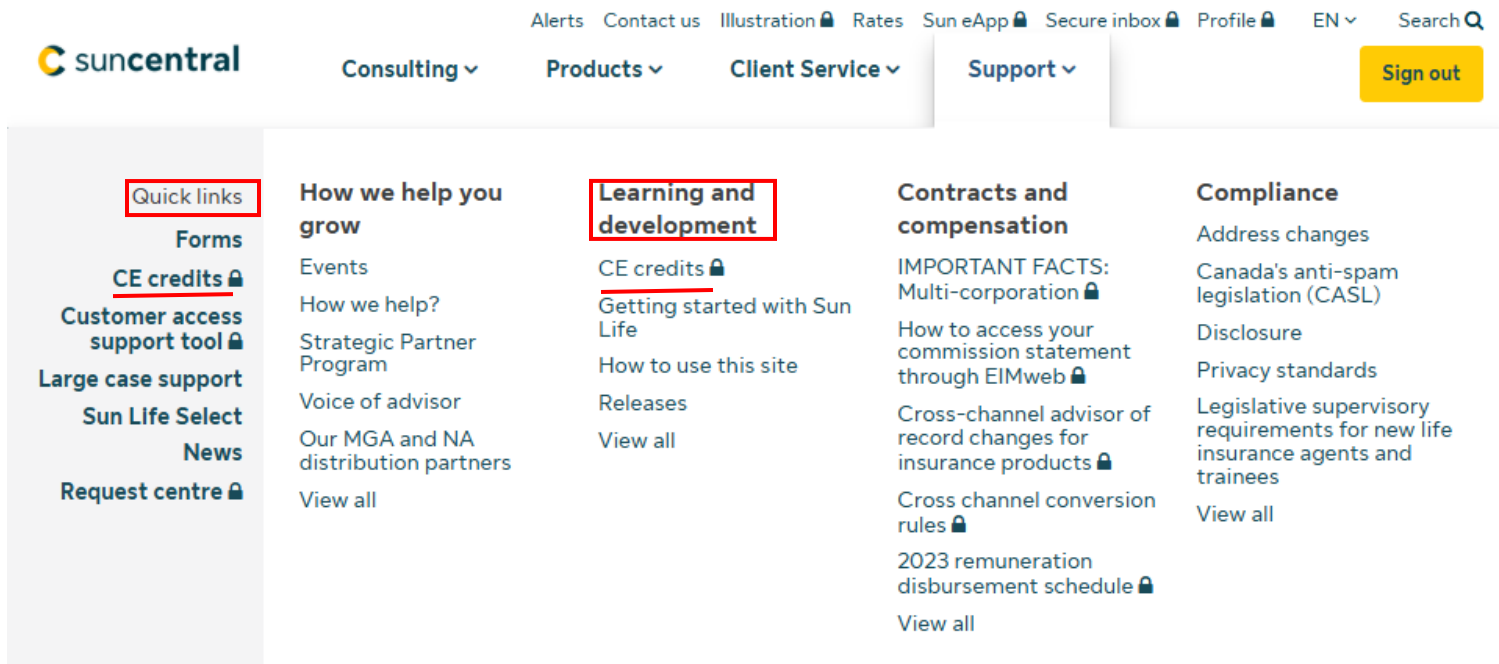
Accessing Advisor Learning Navigator

[Advisor Learning Navigator Link](#)

1. Log into Suncentral
 - a. [Suncentral Login](#)
2. Hover over the '**Support**' tab

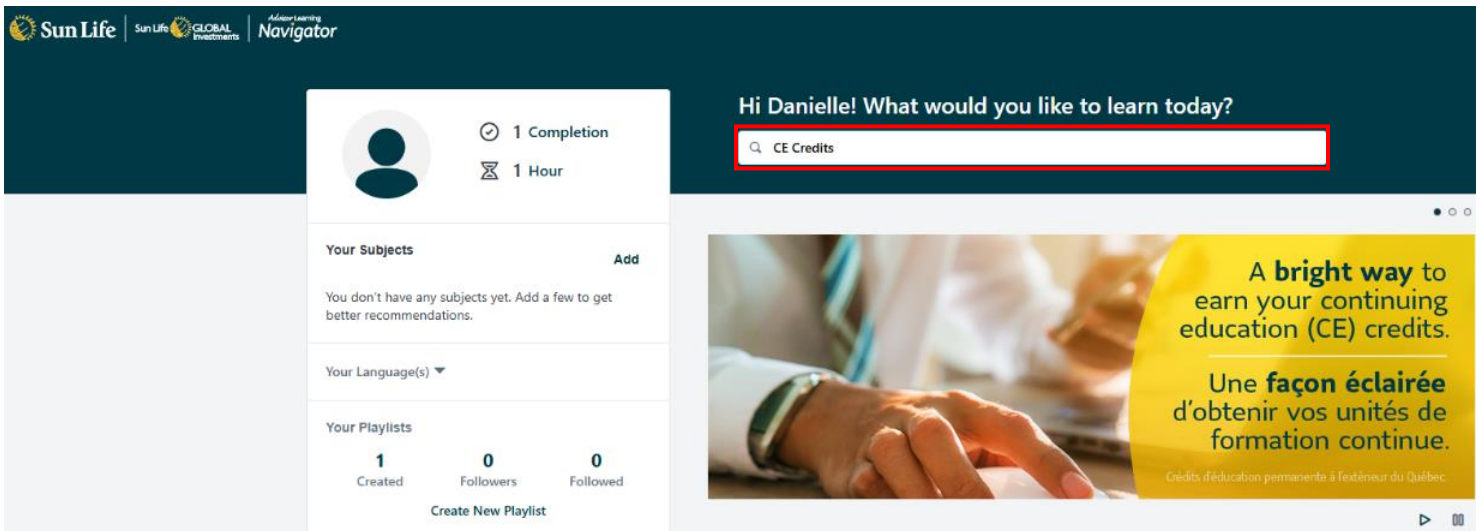


3. Under '**Quick Links**' column (far left), select **CE credits** or under the '**Learning and development**' column, select **CE credits**

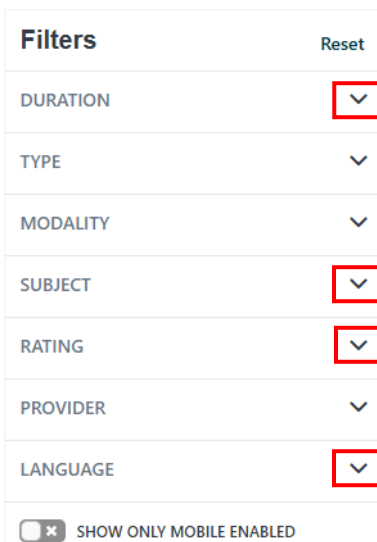


Find courses and CE Content

1. From the landing page, type **CE Credits** into the 'search for learning' box, enter.



2. Use 'filters' to help narrow your search for specific CE content
 - a. Apply filters for Duration, Subject, Rating, Language to save time searching for content.
 - b. Turn on the 'Show Only Mobile Enabled' option to view all courses that can be completed from your mobile device.

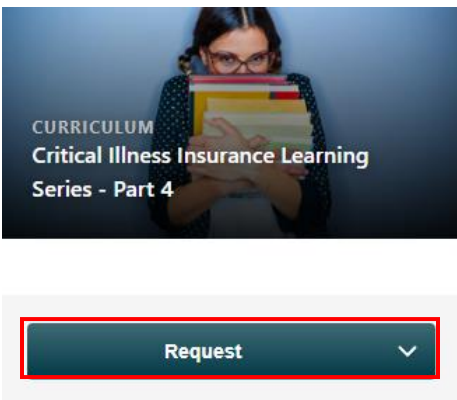


3. Find the CE course you wish to complete. Click on the **title** of the course to get started.



a) Once the course is open, there will be a course description with details on credit(s) available upon completion.

4. To launch a course for the first time, click the **Request** button. Then the **'Launch'** button to begin.



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CURRICULUM PROGRESS

Critical Illness Insurance Learning Series - Part 4 Options ▾

The Critical Illness Insurance (CI) Learning Series is an educational series of modules designed to give you the knowledge, skills and confidence to have CII conversations with a prospect or Client. Part 4 of the series includes three modules:

- Asset protection with CII
- CII in the business market
- CII taxation

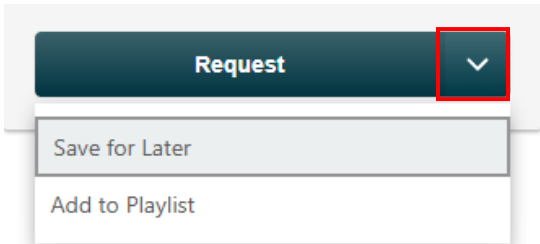
Note: CE credits are available upon completion of all three modules. Modules need to be completed in order.

	<p>Asset protection with CII Status : Registered Due : No Due Date Training Hours : 20 min By the end of this module, you will be able to explain how critical illness insurance can be used as an asset protection strategy to a Client or prospect.</p>	<div style="border: 2px solid red; padding: 2px;"> Launch ▾ </div>
	<p>CII in the business market Status : Pending Prior Training Due : No Due Date Training Hours : 20 min By the end of this module, you will be able to explain how business owners can use critical illness insurance to protect a key person. You will also be able to...</p>	
	<p>CII taxation Status : Pending Prior Training Due : No Due Date Training Hours : 20 min By the end of this module, you will be able to identify expected tax treatments of CII premiums and benefits based on current tax laws and guidance from the...</p>	

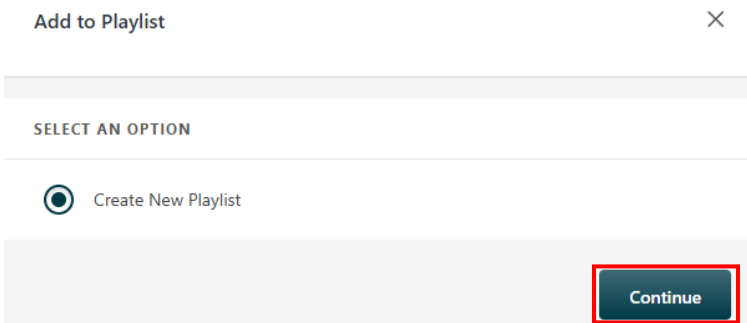
a) If you have previously launched a course, the **Request** button will show **Open Curriculum** instead.

Create a Playlist

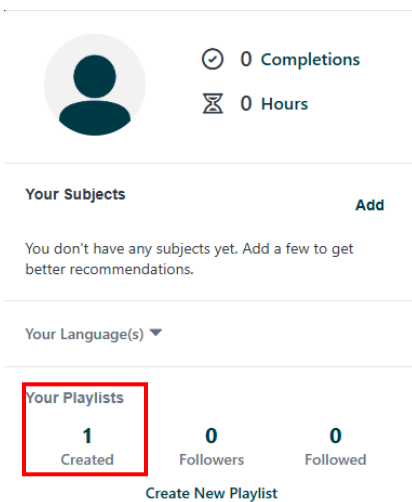
1. Click the drop-down arrow beside 'Request' for additional options to **Save for Later** or **Add to Playlist** (you can create a playlist of all CE courses you wish to complete).



- a) Adding a playlist can provide quick access to content, removing the need to search, click add to playlist and continue.
- b) You will need to give the playlist a name ex: CE Courses
- c) Add all the courses you are interested in completing to this playlist

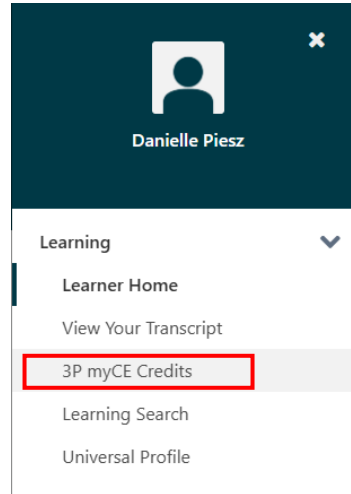
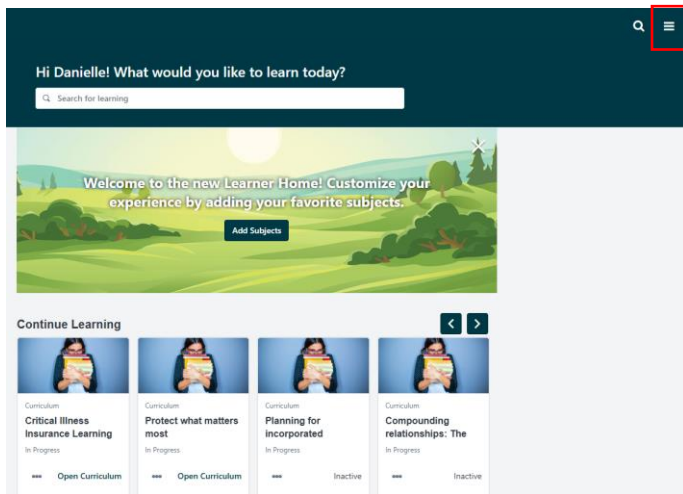


- a) This will now provide easy access from your ALN landing page. Simply click **Created** under 'Your Playlists' on the left menu.



View your earned CE Credits

1. From the landing page, click on the 3 bar lines (top right corner) to show navigation menu, and click **My CE Credits**, select the **target icon** to launch the transcript report page.



CE Credits

Click the image to run your Transcript report to see your CE credits by jurisdiction

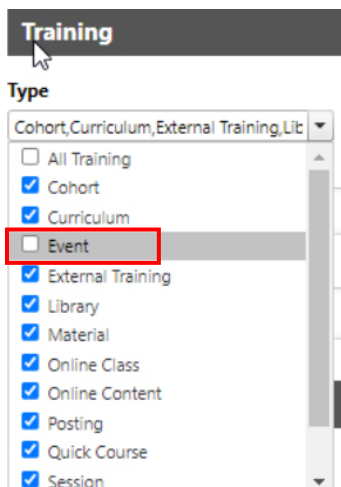


2. From the **Transcript Report** page, complete the training section as follows:

Note: The **Title** section requires no action.

Type:

To avoid duplication of courses, from the drop-down menu, deselect **Event**.



Subject:

Click on the icon, to search for **CE credits**, enter, and then select it from the **Subject Name** list.

The image shows a user interface for selecting a subject. At the top, there is a text input field labeled "Subject(s)" with a search icon (magnifying glass) to its right. Below this is a modal dialog box titled "Select Subject" with a close button (X) in the top right corner. Inside the dialog, there is a search bar containing the text "CE credits" and a "Search" button. Below the search bar is a list of results under the heading "Subject Name". The list contains one item, "CE Credits", which is highlighted. Below the list, it says "1 Result". At the bottom of the dialog is a "Cancel" button.

3. From the **Transcript Report** page, complete the **Date** section as follows:
 - Select **Training Completion Date**.
 - Select the **date range** from which you would like to see the CE credits you earned.

4. From the **Transcript Report** page, complete the **Advance** section as follows:
 - Check the include **Training Detail Information** box.
 - Select all regulating bodies applicable for your license(s)/designation(s) renewal(s).
 - Note: If the regulating body requires an accreditation number, you can also select the Accreditation # to be added to your transcript.
 - Click **Run Report**
 - Select location to save and then open the file.
 - A report on all your completed courses will appear. You will see the number of CE credits earned for a specific course.

Advanced

Include Associated Training (Curriculum Training and Pre or Post Work)

Include Archived Training

Include Completed Training Only

Show most recent completion

Show all completions if the user has completed more than one instance

Include Training Detail Information

<input type="checkbox"/> AB A&S	<input checked="" type="checkbox"/> BROC Accredited #	<input type="checkbox"/> MFDA Credits	<input type="checkbox"/> QC Grp Ins of Per
<input checked="" type="checkbox"/> AB Accredited #	<input type="checkbox"/> BROC Compliance	<input type="checkbox"/> ON Life A&S	<input type="checkbox"/> QC Ins of Per
<input type="checkbox"/> AB Life	<input type="checkbox"/> BROC Prof Dev	<input type="checkbox"/> Price	<input type="checkbox"/> SK Ethics
<input type="checkbox"/> Advocis (IAFF)	<input checked="" type="checkbox"/> ICQPF Accredited #	<input type="checkbox"/> Provider	<input type="checkbox"/> SK Life A&S
<input checked="" type="checkbox"/> Advocis (IAFF) Accredited #	<input type="checkbox"/> ICQPF PDQM	<input checked="" type="checkbox"/> QC Accredited #	<input type="checkbox"/> SK Non-insurance
<input type="checkbox"/> BC Life A&S	<input type="checkbox"/> ICQPF SC	<input type="checkbox"/> QC Brokerage	<input type="checkbox"/> Training Hours
<input type="checkbox"/> Credits	<input checked="" type="checkbox"/> MB Accredited #	<input type="checkbox"/> QC Compliance	<input type="checkbox"/> Training Purpose
<input checked="" type="checkbox"/> FP Canada Accredited #	<input type="checkbox"/> MB Life A&S	<input type="checkbox"/> QC General	<input type="checkbox"/> Version
<input type="checkbox"/> FP Canada Credits	<input checked="" type="checkbox"/> MFDA Accredited #		

This is the section to select your Province and or Regulator.

In Green : options to select when accreditation number is required.

Back

Run Report

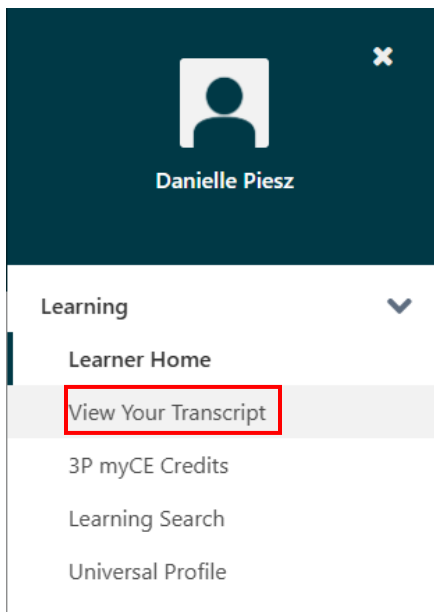
TIPS:

- When opening your report in Excel, make sure you click on **Enable** content if you do not see the appropriate jurisdiction column or see it only partially.
- Do not hesitate to add filters to the excel report to make it easier to read!

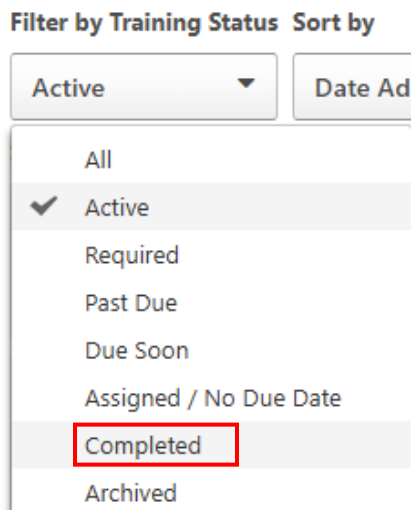
Locate/Print CE Certificates

To locate and print your CE certificates:

1. From the landing page, click on 3 bar lines (top right corner) to show navigation menu and click '**View Your Transcript**'



2. Select **Completed** from the first drop-down arrow (shows **Active** by default)



3. Beside the name of the session that gives CE credits, click on the drop-down arrow next to the **View Completion** button and select **View Certificate**.


Home > Danielle Piesz > Transcript: Danielle Piesz

Transcript: Danielle Piesz

Use the drop down button below to view your Active, Completed, or Archived learning

Filter by Training Status: Completed | Sort by: Completion Date | Filter by Training Type: All Types | Search by Keyword: Search

Search Results (1)



Universal Life Insurance: How it works, the policy fund and tax-exempt limits
 Completed : 6/26/2025 Status : Completed Training Type : Curriculum Training Status : Completed

View Completion... ▾


- View Completion Page
- View Certificate
- Open Curriculum
- View Training Details

4. The Certificate will open and you will be able to download or print if required.


CustomCertificate.aspx - Google Chrome

sunlife.csod.com/LMS/Eval/CustomCertificate.aspx?qs=%5e%5e%5eJlxGG2vnMgx4Z0c%2bamkae...

Custom... 1 / 1 | 37% | [Download] [Print]



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Sun Life
 Sun Life Assurance Company of Canada
 Sun Life du Canada, compagnie d'assurance-vie


This certificate confirms that / Ce certificat confirme que **Danielle Piesz**
 has successfully completed the following training on / a complété avec succès la formation ci-dessous le **6/26/2025**

Universal Life Insurance: How it works, the policy fund and tax-exempt limits

Presenter(s)	Accreditation # / reconnaissance	Continuing Education (CE) Credits and CE category (if applicable) / Dots de formation Continue (DFC) et Catégorie
Alberta Insurance Council*	68499	1 - Life Vie
Insurance Council of British Columbia	SI-24-066	1 - Life and ABS (Via/Acc. Maladie)
Insurance Council of Manitoba	46518	1 - Life and ABS (Via/Acc. Maladie)
ISRA (Ontario)	SI-24-066	1 - Life and ABS (Via/Acc. Maladie)
Insurance Council of Saskatchewan	SI-24-066	1 - Life and ABS (Via/Acc. Maladie)
Chambre de la sécurité Financière*	CS24-05-41950	1 - Insurance of persons / Assurance de personnes
Institut de Planification Financière		
IAIFI (Advocis)	IAQ2409201	1 - General / Générales
IFP Canada™ Approved CE credits	15554	1 - Product Knowledge / Connaissance du prod.
CRD, Mutual Fund Division	1000004710	1 - Professional Development / Perfectionnement professionnel
CRD, Investment Dealer Division	24-1120P	1 - Professional Development / Perfectionnement professionnel
CRD, Division des courtiers en valeurs mobilières		

*Indicate your CE labels sending this certificate to their organization
 *Indiquez toujours votre numéro de permis avant d'envoyer ce certificat à son organisme

AMF Québec
 DM Québec


 Amanda Guba
 Manager, Continuing Education / Gestionnaire, Formation Continue

Contact Us

If you have any questions, please email advisorlearningnavigator@sunlife.com