

## ONLINE INVESTMENT MANAGEMENT EDUCATION

**Increase your competitive edge with our online education.**

The Investments & Wealth Institute has a variety of options suited to your learning style, CE needs and more. Below, find short, 1-hour recordings; live, 4-hour virtual events; and in-depth, online courses for 3 to 20 CE hours. Consider taking your education and credentials to the next level by enrolling in the Certified Investment Management Analyst® (CIMA®), certification program.

| Topic  | CE Hours | Type                             | Cost                                   |
|--|----------|----------------------------------|--|
| <a href="#">Global Investment Outlook &amp; Best Practices</a>   | 1        | On-demand recording              | Member: \$50<br>Nonmember: \$75        |
| <a href="#">All Options on the Table: Holistic Investment Strategies for a Volatile, Low-Yield World</a> | 3        | Course                           | Member: \$295<br>Join and Learn: \$495 |
| <a href="#">MMI/Morningstar Sustainable Investing Curriculum</a>   | 3.5*     | Course                           | Member: \$595<br>Join & Learn: \$695   |
| <a href="#">Investment Advisor Forum 2020 On-demand</a>  | 4        | On-demand recording              | Member: \$249<br>Join & Learn: \$449   |
| <a href="#">An Introduction to Alternative Investments</a>   | 4        | Course                           | Member: \$249<br>Join & Learn: \$449   |
| <a href="#">Focus on Investment Portfolios for HNW Clients</a>   | 4        | Virtual event: November 10, 2020 | Member: \$195<br>Join & Learn: \$445   |
| <a href="#">HNW Tax Strategies for 2020</a>  | 4        | On-demand recording              | Member: \$249<br>Join & Learn: \$449   |
| <a href="#">Trends in Portfolio Management</a>   | 4        | On-demand recording              | Member: \$249<br>Join & Learn: \$449   |
| <a href="#">Option Strategies for Advisors Course</a>  | 8*       | Course                           | Member: \$495<br>Join & Learn: \$695   |
| <a href="#">Endowments &amp; Foundations Consulting</a>  | 13       | Course                           | Member: \$995<br>Join & Learn: \$1,195 |
| <a href="#">Essentials of Investment Consulting</a>  | 15*      | Course                           | Member: \$545<br>Join & Learn: \$745   |
| <a href="#">CIMA Certification®</a>  | 40*      | Certification                    | Costs vary depending upon provider     |
| <a href="#">What will Advisory Services Look Like in Five Years?</a>                                     | n/a      | Podcast                          | Free                                   |
| <a href="#">Impact Investing</a>   | n/a      | Podcast                          | Free                                   |
| <a href="#">Economic Disruptions w/ Marci Rossell, Ph.D.</a>   | n/a      | Podcast                          | Free                                   |
| <a href="#">Financial Market Transparency Theory w/Paolo Sironi</a>                                      | n/a      | Podcast                          | Free                                   |
| <a href="#">Option Strategies w/Marc Odo</a>   | n/a      | Podcast                          | Free                                   |

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On-demand recording: 1 CE hour, quick and convenient

Self-paced course: 5–20 CE hours, interactive quizzes

Virtual event: 1–4 CE, real-time with expert Q&A

\* includes CFP CE

\*\* Join and learn includes 1-year membership