

Continuous Learning Center

Education Marketplace



To address critical knowledge gaps in the rapidly changing financial services industry, MMI has partnered with a number of respected industry education providers to offer their highly-regarded training curriculums through the Continuous Learning Center.

The Education Marketplace includes offerings that address a variety of topics and are suitable for investment professionals with different levels of industry knowledge and experience.



The **Fundamentals of Alternative Investments Certificate Program** is presented by CAIA Association, the global leader in alternative

investment education. The course fills a critical education gap for individuals who seek to understand the ever-changing landscape of alternative investments. The 20-hour, online course covers portfolio construction, risk management, due diligence, hedge funds, private equity, real estate, and much more. The certificate program is recommended for financial advisors, individuals in administration, operations, sales or marketing, and legal/compliance professionals.



The **Essentials of Investment Consulting Program**, presented by Investments & Wealth Institute, is comprised of two

courses, **Investment Consulting Process** and **Math for Investment Consultants**. The courses are tailored for financial services professionals and their teams seeking to enhance their fundamental knowledge of core topics related to the investment consulting process. The program covers fundamental concepts and applications, including how to select managers, construct portfolios, investment types, manager selection, performance measurement, investment policies, and math for investment consultants.



CFA Institute

The CFA Institute **Investment Foundations Program** is an online comprehensive global education program that provides a clear

understanding of investment industry essentials. The program is designed for all professional disciplines outside of investment roles, including information technology, operations, accounting, administration, and marketing. The eight-module program covers ethics and regulation, investment instruments, and serving client needs.



The PRI Academy offers four curriculums with specialized content at core and advanced levels.

- **Responsible Investment Fundamentals** is a short, three-hour training course designed for professionals across the business spectrum who want a base knowledge of, and insight into, responsible investing.



CONNECT



KNOW



GROW

- **Responsible Investment Essentials** is a 12-hour course that explores the key principles of responsible investment, focusing on the identification and implementation of environmental, social and governance (ESG) factors into investment decision making.
- **Enhanced Financial Analysis** is a six-hour course that explores and examines the use of sustainability data in fundamental investment analysis and stock valuation.
- **Sustainable and Responsible Investment for Trustees**, featuring content from leading international experts, real-life and hypothetical case studies, and financial modeling, is designed to help trustees and board members maximize their understanding and practical application of key ESG concepts in the shortest possible time frame.

US|SIF Fundamentals of Sustainable and Impact Investment, presented by US SIF, covers the

implementation of ESG data into security analysis, discusses the latest trends and research, and explains how to communicate your expertise in sustainable and impact investment. The four-model course, which is offered in both online and live training formats, is designed as an introductory resource for investment advisors, financial planners, and other financial professionals.

BENEFITS

- Content developed by subject matter experts
- Regularly updated to keep up with latest industry trends
- Turnkey solution for in-house L&D and training teams
- Provides training progression for employees and streamlines new employee onboarding
- Provides a competitive edge and differentiation
- Certain curriculums eligible for CE credits for different professional designations
- Streamlined on-demand access
- Accessible 24/7 to accommodate any schedule

MMI CONTINUOUS LEARNING CENTER

The MMI Continuous Learning Center offers a structured, comprehensive education platform for all career stages of the investment professional. Available programs include Fundamentals of Investment Advisory Solutions, Sustainable Investing Curriculum, Wealth Management Essentials, Wholesaler Training Curriculum, and an Education Marketplace of third-party offerings. For more information or to schedule an online demonstration, contact us at **(646) 868-8500** or learning@mminst.org.