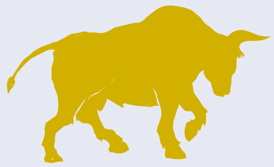
Money Management Institute

ADVANCING THE FUTURE OF INVESTMENT ADVICE AND SOLUTIONS

Continuous Learning Center

Wealth Management Essentials

POWERED BY THE SS&C Learning Institute



The Wealth Management Essentials curriculum offers a well-rounded introduction to the financial services and investment management industries. The 30 courses provide a foundational understanding of the financial markets, the investment products landscape, principles of investment management, the keys to client management, and elements of corporate finance.

These are foundational courses designed for those new to—or interested in pursuing—a career in wealth management. Designed by experts, this concentrated program provides a thorough overview of the markets, investing, and industry relationships and is suitable to a wide range of potential career paths in wealth management.

FIVE KEY TOPICS: 30 Fast-Paced Courses

INTRODUCTION TO FINANCIAL MARKETS

1. Introduction to Securities Markets
2. Introduction to World Equities Markets
3. Introduction to World Bond Markets
4. Introduction to Private Equity

INVESTMENT PRODUCTS LANDSCAPE

5. Investing in Equity
6. Investing in Bonds
7. Exchange Traded Funds
8. Mutual Funds
9. Alternative Investments
10. Investing in Hedge Funds
11. Insurance Overview—US

INVESTMENT MANAGEMENT PRINCIPLES

12. Investment Principles
13. Asset Allocation
14. Portfolio Returns
15. Portfolio Risk
16. Portfolio Diversification
17. Understanding Uncertainty
18. Introduction to Portfolio Management

CLIENT MANAGEMENT

19. The Human Side of Investing
20. Introduction to Financial Planning Products
21. Understanding Financial Planning
22. Introduction to Performance Measurement
23. Managing Client Expectations
24. Information Security Awareness

CONNECT KNOW GROW

ELEMENTS OF CORPORATE FINANCE

25 Introduction to Investment Banking

26 Introduction to Corporate Finance

27 Time Value of Money

28 Introduction to Economic Profit

29 Fundamentals of Economic Indicators

30 Capital Asset Pricing Model

The Wealth Management Essentials curriculum is ideal for:

- Students or individuals considering a career in financial services
- Summer interns
- New employees onboarding
- Existing employees who would benefit from a broader understanding of—and perspective on—the wealth management industry
- Financial advisor support teams

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
- Eligible for CE credits on an individual course basis from Investments & Wealth Institute® for CIMA®, CPWA®, CIMC®, and RMA® designations
- Streamlined on-demand access
- State-of-the-art learning management system powered by Kaplan SmartPros
- Mobile-friendly and accessible 24/7 to accommodate any schedule
- Reporting tools to monitor course progress
- Digital badges available upon course completion

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**.