



MMI-100: Introduction to the Investment Advisory Industry

This class covers the basics of the financial services industry. It introduces concepts, terms and definitions that define the managed solutions space within the industry. There is an overview of the most-used investment vehicles, as well as discussions on the role of advisors, plan sponsors and fiduciaries. Additionally, licensing and designations are reviewed. This class can serve as a refresher for anyone in the business as well as a starting point for those who are new to the industry.

MMI-101: Basics of Investing

This class concentrates on how a portfolio may be constructed in order to meet client objectives. An in-depth look at developing an investment strategy in order to build a portfolio is covered. This includes learning the concepts of strategic allocation, tactical allocation, active and passive management, top down and bottom up approaches to security selection, as well as fundamental versus technical analysis. Asset diversification and risk mitigation are also covered.

MMI-102: Evolution of the Managed Solutions Industry

This class will cover the history and evolution of managed investment solutions. As one of the most popular face-to-face classes, it takes a close look at each of the current managed investment solutions, how they came to be, why they are popular, as well as future growth potential. The class includes a case study in unified managed accounts, highlighting how they are constructed and the use of an overlay manager. The end result is that the student will fully understand how each managed investment solution operates today as well as why advisors will continue to utilize them going forward.

MMI-200: The Sales Process and Client Interview

This class explores what the experts say are best practices when taking an investor from a prospect to a client. The phases in a taxable investor's life are explained in addition to the process that many top advisors use to profile, or snapshot, their clients. From the first meeting to the close, the class discusses what experts consider to be vital information toward building a relationship. Topics like risk and reward, goal setting, and the creation of an investment policy statement are addressed. Included in this class are two case studies, one covering the challenges of saving for children's college educations and the other, dealing with the complexities of Social Security distributions.

MMI-201: Baby Boomer Investing

It is estimated that there are over 76 million American baby boomers that have shaped our world in countless ways. The financial services industry spends millions targeting this market and is continually evolving in order better serve this segment of the population. Today's financial advisor must learn the intricacies of how these individuals think and how to best prepare them for the stages of retirement. In order to do this, the class covers baby boomer challenges and solutions.

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MMI-202: Technology to Service and Support Managed Solutions

This important class will walk the student through the evolution of technology as well as a comprehensive overview of the tools an advisor requires to manage his or her practice. We will focus on multiple systems from client relationship management tools to client profiling applications. This class covers basically everything that makes up the advisor's platform that is used to prospect and maintain a book of business.

MMI-203: The Unified Managed Household And What it Means to the Financial Advisory Business

This topic is so important, it warrants a class of its own. Technology is moving fast to keep up with the demand for comprehensive advice. It is not about the product sale anymore. Rather, it is about looking at all accounts and their registrations and formulating a plan based on the entire household. The plan must be managed with overlay technologies that are capable of coordinating all accounts, regardless of where they are held. The technology tools are especially critical in the distribution phase, where clients are dependent on a predictable stream of income. This class explores these technologies and how they will continue to evolve.

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