

Completing a VES Class FAQ

I just registered for a VES Class, and I see several sections (tabs) and components within each section. How should I proceed?

Completing a VES Class is a simple and intuitive process. Each VES Class has been designed to be completed like reading a book, starting with the left upper section (page) and going from the top component (text) to the bottom component in that section, before proceeding to the next section (page) on the right. To begin a VES Class, start with the upper left section labeled “Start Here.”

If this is your first VES Class, It is strongly recommended that you view the “How to Access and Complete a VES Class” video or documentation.

Other helpful resources include the “Understanding the VES Interactive Video Controller” video and the VES Agreement & Disclaimer. All of these resources can be found in the “Start Here” section of the VES Class or at: www.aaii.com/learn

I am selecting various documents in the class, but I cannot see them.

All VES documents are downloaded in a PDF (portable document format) format. To view these documents, you may need to install a free program like Adobe Acrobat Reader. Most VES documents will be sent to your device’s download folder. Please access the documents for viewing or printing from this area. The location of this area will vary according to the type of device, operating system and browser that you are using.

I cannot get my presentation video to play, or I am having trouble finding or using the interactive video controls.

The first thing to do is to watch the “Understanding the Interactive Video Controller” video. This video will resolve 90% of cases. The second option is to review the “Understanding the Interactive Video Controller” document. Both resources can be found at: www.aaii.com/learn.

If you still have trouble viewing your presentation video after reviewing these resources, please switch to the Chrome browser, as not all browsers are supported, such as Internet Explorer. If an ad blocker is still blocking the presentation video and not giving you the option to proceed, then you may have to adjust your settings to run the videos.

Additionally, please note that with all types of online interactive content, your device’s advanced security features may block or interfere with the presentation video and its features. To resolve this problem, please adjust your settings or consider running the presentation video from an alternate device.

When I start a presentation video, I see a pop-up blocker message. What should I do?

The pop-up blocker is an expected behavior with most web browsers; it alerts users that the presentation video has interactive content. To access the presentation video, please click the “launch course” or another similar message. AAII does NOT encourage or recommend users to reduce their protection level or to turn off pop-up blocker messages. The message is there for your protection, and it can be easily circumvented for these VES Classes by simply choosing to continue.

For more information, please see the “Understanding the Interactive Video Controller” video or document at: www.aaii.com/learn.

I am hearing-impaired or need to watch a presentation video without sound.

All the VES presentation videos have closed captioning that can easily be turned on from the Interactive Video Controller toolbar at the bottom of the window.

How do I access and control the advanced playback features of the presentation video?

All VES Classes are created in a Sharable Content Object Reference Model (SCORM) format. SCORM is the industry standard for delivering high-quality interactive educational content. With this format, AAII has included advanced playback functionality, embedded quizzes, chapter tables of content, word searchability, minimum viewing requirements, interactive hyperlinks, and closed captioning with each presentation video.

Most users will likely use the standard controls, as with any online video. For those who would like to utilize some of the additional functionality, please review the “Understanding the Interactive Video Controller” document or the “Understanding the Interactive Video Controller” video at: www.aaii.com/learn.

How long does it take to complete a VES Class?

The amount of time needed to complete a VES Class depends on several factors, including the user’s current knowledge base and familiarity with the topic, how quickly they learn and how deeply they want to learn. As a general estimate, it may take approximately two to four hours to complete a one-hour VES Class. This time estimate includes viewing the presentation video and repeating sections when necessary, reviewing all the supplemental materials and taking the test. A user familiar with a topic who simply views the presentation video once and passes the test on their first attempt could theoretically complete a VES Class with a one-hour presentation video in one hour and 10 minutes.

Do I have to complete a VES Class or view a presentation video in a single sitting?

All VES offerings can be accessed seven days a week, 24 hours a day. You may begin or retake a VES Class or a portion of a VES Class as often as you would like, as long as you complete it before your VES offering expiration date. The presentation videos have been designed to remember where you left off, so that you can resume the video at a later time. To leave a presentation video in progress, simply toggle out of the full-screen view of the video and select the “Complete Video Later” button on the top right of the video. For more information, see the “Understanding the Interactive Video Controller” document or video at: www.aaii.com/learn.

Do I have to do all the components of a VES Class? What if I just want to complete the VES Class as quickly as possible to accrue the credits, obtain the benefits, and gain access to the Certificate of Completion?

Many of the sections and components in a VES Class are there to provide additional information. These optional areas are not required for completion. For those who would like to complete each VES Class as quickly as possible, the only area that is necessary is the “Primary Program” section. Within that section, the only components that must be completed are viewing the presentation video and taking, and passing, the test.

What happens if I cannot pass the test for a VES Class?

VES Classes are designed to educate investors and ensure that they have learned the basic concepts of each VES Class. Tests are not intended to trick or fail investors who are trying to learn. Because of this, unlimited attempts to pass a test are allowed to accrue the VES Class credits, obtain the class benefits, and acquire the Certificate of Completion.

If, for some reason, you fail to pass a test on the first try, you can simply take the test over or repeat the presentation video and try again. If there is one specific area of a VES Class that you are having trouble with, you can use the Interactive Video Controller’s table of contents to jump to a particular chapter to review that material. You can also do a keyword search to jump to all the areas in the presentation video on that material.

To obtain official AAI^I EI Course Certification, you must pass the EI Course Certification exam in the EI Structured Course. Participants are given three total attempts to pass. If another attempt is needed, an EI Course participant can request an additional attempt by contacting AAI^I Member Services at members@aaii.com.

What is required to complete a VES Class, accrue the credits, obtain the benefits, and acquire the Certificate of Completion?

Most VES Classes require meeting a minimum video viewing time (usually > 90%) and passing the VES Class test (usually > 70%). Unless otherwise noted, there are no limits to the number of times a presentation video can be viewed, or a VES Class test can be attempted to attain a passing grade.

How do I know when I have met the minimum required viewing percentage for a presentation video?

The video status button (N) wording will change to “Complete video” from “Complete video later” when you have viewed the minimum percentage of the presentation video. At this point, you may click the status button and return to the primary course console, where the appropriate components of the VES Class will now be unlocked (bonus videos, test, Words of Wisdom etc.).

Why is the VES Class test, and some of the other VES Class benefits, grayed out and inaccessible?

VES Classes have been designed to maximize learning. Therefore, certain components of a VES Class must be addressed and completed sequentially before other remaining components are unlocked. For instance, the presentation video must be viewed (90% minimum requirement) before a participant can access the test. The test must then be passed (70% or greater) to accrue the credits, unlock the Certificate of Completion, and obtain any of the class benefits.

For more information, please view the “How to Navigate and Complete a VES Class” video at www.aaii.com/learn.

What is a Segment Incentive Bonus (SIB)?

Upon completion of some of the VES Classes, participants are given the option to view and consider a special Segment Incentive Bonus from the instructor. Offers may include a free book, subscription, or other discounted or complimentary service related to the class content.

What is the Words of Wisdom component?

Upon completion of most of the VES Classes, participants are given the option to view and download a Words of Wisdom document containing each speaker’s single best piece of investment advice.

Can I print or download the supplemental educational materials—such as slides, definition pages, calculators, spreadsheets and related articles—for future reference?

Yes, each participant can download and store all educational resources indefinitely. This includes the Certificate of Completion and the Words of Wisdom documents. Additionally, a Segment Incentive Bonus (SIB) can be used after the class expiration, provided that the bonus is still being offered by the original class instructor.

Who do I contact if I have a question about the content of a VES Class, or I want to get more information about an instructor and their teachings or offerings?

Most VES Classes include contact information provided by the specific instructor. Guest instructors may or may not respond to your inquiry, and AAII has no relationship with or bears any responsibilities in these matters. AAII instructors will do their best to respond to your request in a timely manner.