



Essential Investing (EI) Course Certification Benefits

Updated and available as of 5/1/2024

Benefit Overview

This document details the currently available EI Course Certification benefits. All EI Course participants who pass the final exam and obtain "AAII EI Course Certification" will be eligible for the EI Course Certification benefits. Benefit access instructions and credentials will be sent to each participant immediately after passing the EI Structured Course exam. EI Course Certification can only be obtained by completing the EI Structured Course. *

Individual VES Class benefits ("Segment Incentive Bonuses") are considered separate and can be realized and attained immediately after passing any associated class with an offered benefit. Individual class bonus offers can be viewed in the class overview or on the "snapshot" tab within each class. Accessing or utilizing any course-level benefit or class-level bonus is purely optional and has no bearing on completing the EI Course. **

Benefit Highlights

- 1) EI Course Certificate for participants attaining official AAIL EI Course Certification
- 2) Complimentary one-year AAIL membership, including AAIL's Stock Screens and the AAIL Journal
- 3) 30 Days of free access to the entire AAIL Platinum subscription bundle
- 4) Exclusive access to AAIL's Active Investing Workshop webinars
- 5) *Complimentary access to one AAIL Workshop at the AAIL National Conference or select MoneyShow events*
- 6) Complimentary access to one AAIL Local Chapter Meeting
- 7) Complimentary access to select VES Video Classes (*see listing of included classes*)
- 8) Early bird access and substantial discounts on other upcoming VES Classes
- 9) Downloadable PDF containing all the Words of Wisdom statements in the entire EI Course
- 10) Continuous access to AAIL's Active Investing WorkStation (*TradeStation platform required*)

Benefit Details

1) Certificate highlighting EI Course Certification (*download*)

Upon passing the final EI Certification Exam, EI Structured Course participants will gain immediate access to their AAIL EI Course Certification certificate. This certificate will document each EI Course participant's understanding and comprehension of the essential elements of investing and the achievement of attaining AAIL EI Course Certification.

2) One year of complimentary AAIL basic membership

EI Course Certified participants will receive a complimentary one-year AAI membership. Membership includes access to the AAI website, AAI Stock Screens, basic web tools, all current and past articles and the AAI Journal.

3) 30 Days of Free access to the AAI Platinum bundle

EI Course Certified participants will receive an offer for 30 days of free access to AAI Platinum. AAI Platinum is a complete subscription bundle that includes all of AAI's model portfolios, premium services (Dividend Investing, Growth Investing, Retirement Investing, Stock Superstars Report, VMQ Stocks, and A+ Investor -- a \$945 value), and any additional future newsletters that may be added, typically priced at \$199 each.

4) Exclusive access to AAI's Active Investing Workshop webinars

EI Course Certified participants will be granted access to AAI's Active Investing Workshop webinars. In these quarterly webinars, AAI analysts will lead interactive "live" market and stock analysis sessions. Coverage will include a review of the primary investment markets, where they have been, and where they may go. Coverage will also include the applications of the specific strategies and indicators covered in the EI Course, along with guidance for setting execution targets on some of AAI's highest-rated stocks.

5) Complimentary access to one AAI Workshop at the AAI National Conference or a select MoneyShow event

EI Course Certified participants will receive complimentary access to an AAI Workshop at a future AAI National Conference or select MoneyShow event. ***

6) Complimentary access to one AAI local chapter meeting

Upon attaining AAI EI Course Certification, participants will receive a certificate entitling them to one complimentary admission to an AAI local chapter meeting (either online or in-person). AAI local chapters are grassroots organizations led by volunteer AAI members. ****

7) Complimentary access to select VES Classes

All EI Course participants will receive complimentary access to the following VES Classes when they are released.

- Denise Chisholm – How to Use Data to Invest
- Louis Navelellier - Selecting Winning Stocks
- Marty Fridson - Fixed Income Investing
- Marvin Appel - Investment Strategies
- Raymond Rondeau – Charts and Technical Analysis
- Rob Bernstein – High Yield Investing Strategy

8) Early bird access and discounts on other upcoming new releases of VES Classes

AAIL EI Course Certified participants who have shown the aptitude and mastered the foundational investment elements covered within the EI Course will be offered early releases and substantial discounts on future VES Classes not listed in benefit 7.

9) Downloadable PDF containing all the Words of Wisdom statements in the entire EI Course.

Upon passing the final EI Course certification exam in the EI Structured Course, participants will receive access to a document containing all of the instructor's Words of Wisdom statements contained within the entire EI Course. This document lists all the Words of Wisdom content in both the EI Structured Course and the EI FlexiLearn Course. Participants will gain access to all of the statements, regardless of whether they viewed the class or not.

10) Continuous access to AAIL's Active Investing Workstation (coming soon)

EI Course Certified participants will receive lifetime access to the Active Investing WorkStation and all the basic investment tools covered in the EI Course. The AI WorkStation will be distributed to each participant with a complimentary lifetime subscription. These tools can be used for educational purposes or real-world signal generation for various strategies covered throughout the EI Course. *****

For general information on the EI Course certification process and the EI Course credit specifications, please go to: www.aail.com/eicourse

For detailed information and a comprehensive listing of resources on a VES Class or AAIL's EI Course, including technical issues, navigation, structure, testing, credit accruals, VES agreements and EI Course certification, please go to: www.aail.com/learn

For specific VES Class or AAIL EI Course-related questions, please contact the VES coordinator at: ves@aail.com

For purchases or a complete listing of VES Classes, VES packages, the EI Course, and their respective features and components, please go to: www.aail.com/ves

For general information on access, purchases, or refunds for a VES Class or the EI Course, please contact AAIL's Member Services department at: members@aail.com.

For AAIL membership or any other AAIL-related product inquiries, please contact AAIL's Member Services department at: members@aail.com

For complete details, terms, rights, and limitations with any VES Class, VES Package or AAIL's EI Course, please access the "VES Agreement and Disclaimer" document at: www.aail.com/learn

* To attain official AAI EI Course Certification, participants must complete the EI Structured Course by completing all of the classes and passing the EI Course Certification Exam. For details on how to attain EI Course Certification, please see the “EI Course Certification Process” at: www.aaii.com/learn.

** EI Certification Benefits and VES Class bonuses are not guaranteed and are subject to change. The EI Certification benefits listed in this document are accurate as of the time of this posting. These benefits may increase or decrease in number and content, and they are not guaranteed to be still available when a participant achieves actual EI Course Certification and eligibility for the benefits. For complete details on the EI Course and EI Certification, please see the “EI Course Certification Process”, “EI Course Certification Specifications,” and the “VES Agreement & Disclosure” documents at: www.aaii.com/learn.

*** A listing of eligible upcoming events will be supplied to each participant at the time of their certification. MoneyShow access and details will be determined on a show-by-show basis and are subject to change.

**** Local chapter meeting certificates are good for one meeting only and for the EI Course participant whose name is printed on the EI Course Certificate. Entry is for general admission and does not entitle the participant to refreshment or food-related benefits. Other exclusions may apply. There may not be a local chapter in every EI Course participant’s area. If in doubt, please contact your local AAI chapter leader before arriving at: <https://www.aaii.com/chapters>

***** To utilize the AI WorkStation, EI Course participants must download TradeStation’s platform. For complete details on the AI WorkStation and the AI Tools, please see the AI WorkStation Overview and AI WorkStation and AI Tools FAQ documents at: www.aaii.com/learn.