



AAII's ESSENTIAL INVESTING COURSE CURRICULUM

Course Content Overview

This document provides EI Course participants with a convenient reference guide for understanding and tracking current and future classes in the EI Structured and EI FlexiLearn Courses. * (last updated 5/2024)



EI Structured Course

This table shows the current list of classes and components included in the EI Structured Course. In addition to these mandatory segments, the EI Structured Course also includes access to all of the “elective/supplemental” classes listed below in the EI FlexiLearn table. *

Title	Instructor	Topic	Level	RES	WOW	SIB	View	Test	Time	Credits
Core Components									510	24
Building Wealth Through Investing I	R. Rondeau	Wealth	All	X	X	X	90%	65%	48	2
Building Wealth Through Investing II	R. Rondeau	Wealth	All	X	X	X	90%	67%	102	3
The Wealth-Building Process	C. Rotblut	Wealth	All	X	X	X	90%	70%	20	1
Investing 101	C. Rotblut	Investing	Novice	X	X	X	90%	70%	28	2
The Case For Active Management	NAAIM	Active Invest	Intermediate	X	X	X	90%	70%	11	1
Mutual Funds 101	C. Rotblut	Funds	Beginner	X	X	X	90%	70%	45	2
The Ins and Outs of ETFs	B. Johnson	ETFs	Beginner	X	X		90%	70%	35	2
Introduction to Stock Investing	W. Thorp	Stocks	Beginner	X	X	X	90%	68%	66	3
Fundamental Stock Screening	W. Thorp	Fundamentals	Intermediate	X	X	X	90%	70%	38	2
Dividend Investing	D. Hageman	Dividend	Intermediate.	X	X	X	90%	67%	72	3
50 Years of Investing Wisdom	K. Fisher	Investing	All	X	X		90%	63%	45	3
Additional Components									54	1
How to Become a Better Investor	B. Johnstone	Investing	All				90%	0%	22	1
Welcome – Overview & Instructions	R. Rondeau	Instructional	Course	X					25	0
Congratulatory Ending & Exam	R. Rondeau	Instructional	Course	X	X	X	0%	70%	7	0
TOTALS									564	25

EI FlexiLearn Course

The table shows the current lists of additional “elective/supplemental” classes in the EI Flexilearn Course. The EI FlexiLearn Course also includes all of the EI Structured Course classes listed in the table above. **

Title	Instructor	Topic	Level	RES	WOW	SIB	View	Test	Time	Credits
Elective/Supplemental Components									104	6
Fundamental Stock Screen Strategies	W. Thorp	Strategy	Intermediate	X	X	X	90%	68%	32	2
How to Create a Retirement Portfolio	C. Benz	Retirement	All	X	X		90%	70%	24	2
Ultimate Buy & Hold Strategy	P. Merriman	Investing	All	X	X	X	90%	63%	48	2
AI Tool Components									47	2
Volume Conviction & RCM	R. Rondeau	Technical	Specialized				90%	68%	29	1
Up / Down Volume & OBC	R. Rondeau	Technical	Specialized	X	X	X	90%	68%	18	1
TOTALS									151	8

VES Future Release Classes

This table lists the VES Future Release Classes that are planned to be released in the upcoming year. VES Future Release classes are considered part of the EI Course. When these classes are released and added to the EI Course, all registered EI Course participants will be sent a notification and access link by email.**

Title	Instructor	Topic	Level	RES	WOW	SIB	View	Test	Time	Credits
How to Select Good Stocks	L. Navellier	Stocks	Intermediate	X	X	X	90%	70%	~ 30	1
How to Interpret Investment Data	D. Chisholm	Strategy	Advanced	X	X		90%	70%	~ 35	1
Basic Chart Reading	R. Rondeau	Strategy	Beginner	X	X	X	90%	70%	~ 45	1
Orders & Executions	R. Rondeau	Retirement	All	X	X	X	90%	70%	~ 30	1
Intro to Technical Analysis	R. Rondeau	Investing	All	X	X	X	90%	70%	~ 60	2
Fixed Income Investing	M. Fridson	Fixed Income	Intermediate	X	X	X	90%	70%	~ 90	3
PROJECTED TOTALS									~ 290	9

Essential Investing Course Totals

This table lists the accumulations for the entire EI Course. These values include the EI Structured “mandatory” classes, the additional EI Flexilearn “elective/supplemental” classes and the projected future release VES Classes.

Title	Instructors	Topic	Level	RES	WOW	SIB	View	Test	Time	Credits
EI Structured Course	8	---	---	13	12	10	--	--	564	25
EI FlexiLearn Course	2	---	---	4	4	3	--	--	151	8
VES Future Release Classes	3	Strategy	Interm.	6	6	5	--	--	~ 290	1
PROJECTED TOTALS									~ 1005	34

VES Class & Segment Detail Key

Title:	<i>The title or topic of the segment</i>
Instructor:	<i>The class's primary instructor</i>
Topic:	<i>The primary focus of the class</i>
Level:	<i>The general level of sophistication of the material being covered</i>
RES:	<i>Resources, slides and reference items are included for enhanced and additional learning</i>
WOW:	<i>Words of Wisdom – the educator's single most important investment-related piece of advice (PDF)</i>
SIB:	<i>Segment Incentive Bonus – segment includes a special offer or complimentary item for completing the class</i>
View:	<i>The required minimum viewing percentage of the video to qualify for the WOW and SIB items and access the class test</i>
Test:	<i>The required minimum test score for the accrual of the class credit to be applied for the EI Course</i>
Time:	<i>The run time in minutes of the presentation video</i>
Credits:	<i>The number of credits that will be accrued upon completion of the class</i>

For questions related to these EI Course details, please contact the Course coordinator at: ves@aaii.com

* EI Course classes and components are subject to change.

** Future EI Course classes and their terms are estimated. Future EI Course classes are not guaranteed to be included in the EI Course.

Completion of the EI Structured Course is dependent on the completion of all of the classes in the sequence that they are listed.

Accrued credits for completing a VES class will be added to the participant's record and carried forward.

Accrued credits may be applied to future AAI offerings and opportunities.

For more information on this or any other EI Course related topics, please see the "EI Course Agreement & Disclosure" document section in the course or at: www.aaii.com/learn.