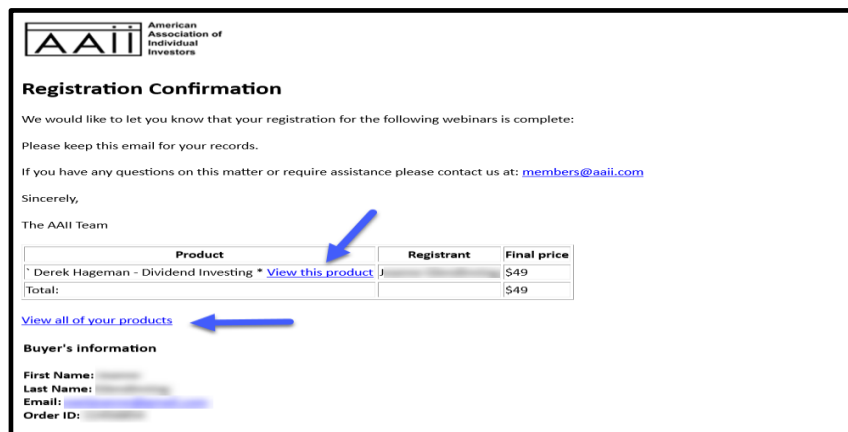


## How to Begin Your First VES Class

*This document was designed to provide first-time AAIL Video Education Suite (VES) class participants with the need-to-know information to begin a class. Please review the content on this page, as it contains essential information to access and begin your first VES Class.*

### Quick Start Guide – 3 Ways to Access A VES Class

1. From the registration email:
  - Click the link in your registration email, and it will take you directly to the VES Class.



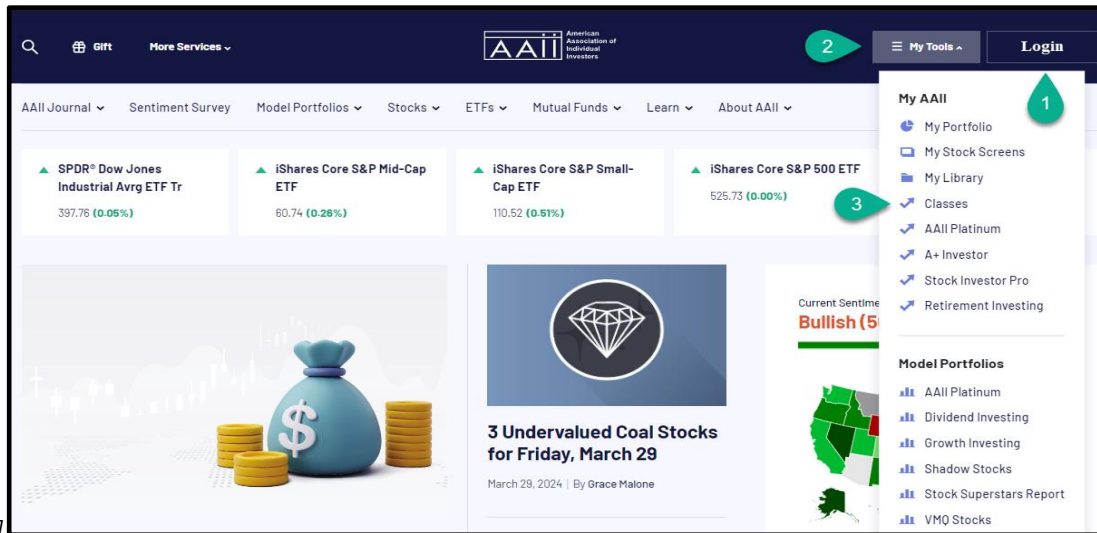
2. From the AAIL Learning Center at <http://www.aaii.com/learn>.
  - Log in at the top of the page.
  - Go to "My Classes" on the right side of the screen.
  - Select the class that you would like to take, and it will take you directly to the class in the LMS.

The screenshot shows the AAII Learning Center website. At the top, there is a navigation bar with 'My Portfolio', 'Membership Options', 'Help', 'Log In', and 'Log Out'. Below this is the AAII logo and a main navigation menu with links for Home, Job, Latest, AAII Journal, Markets, Model Portfolios, Investing Ideas, Screening, Learn & Plan, and Community. A search bar is located in the top right, with an 'Advanced Search' button. Below the search bar, there are filters for 'Search by Format', 'Filter by status', 'Filter by certificate/CE', and 'Search by Type'. The main content area is titled 'On-Demand Products' and lists several courses:

- EI Course Completion - (certification & benefits)**
  - Contains 16 Component(s), includes Credits
  - Completed - You failed the quiz with score of 0/65
  - This final module of AAII's Essential Investing Structured Course focuses on the certification examination and the certification's associated benefits. This section can only be accessed after completing the required EI Structured Course classes.
- Ultimate Buy & Hold Strategy (Paul Merriman)**
  - Contains 6 Component(s), includes Credits
  - Completed - You failed the quiz with score of 0/71
  - In this AAII VES Class, Paul Merriman discusses long-term investing strategies. This is a guest speaker segment with testing and credits.
- Investing 101 (Charles Roblulut)**
  - Contains 3 Component(s), includes Credits
  - Required components before completion: 1
  - In this AAII VES Class, Charles Roblulut covers many of the starting and basic elements of investing, including how to start, where to invest, the various types of accounts, the major types of investments and the keys to becoming a successful investor. Investment areas include: stocks, bonds, cash equivalents, exchange-traded funds (ETFs), real estate investment trusts (REITs), options, metals and cryptocurrency.
- Wealth-Building Process (Charles Roblulut)**
  - Contains 3 Component(s), includes Credits
  - Completed - You passed the quiz with score of 8/11
  - In this AAII VES Class, AAII's Charles Roblulut covers the five-step AAII PRESSM Wealth-Building Process, a framework for achieving your financial goals. He explains the key components, why they matter and provides an associated number of forms and worksheets for each participant.

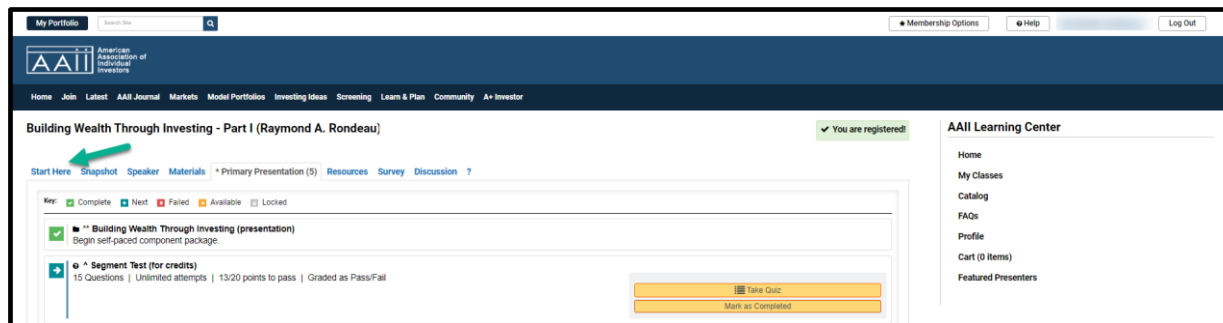
On the right side, there is an 'AAII Learning Center' sidebar with links for Home, My Classes, Catalog, Profile, Cart (0 items), and Featured Presenters. Three purple callout boxes with numbers 1, 2, and 3 are overlaid on the image, pointing to the 'Log In' button, the 'Advanced Search' button, and the 'Ultimate Buy & Hold Strategy' course title, respectively.

- From the AAII homepage.
  - Log in at the top of the page.
  - Select My Tools.
  - Select Classes.
  - Repeat the steps of method 2 above.

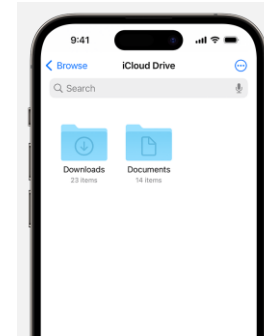
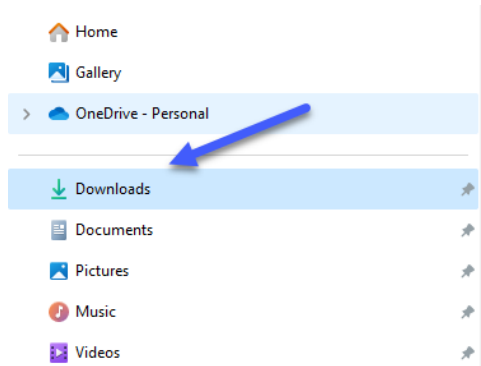


## Quick Start Guide - 5 Things You Need to Know to Complete a VES Class

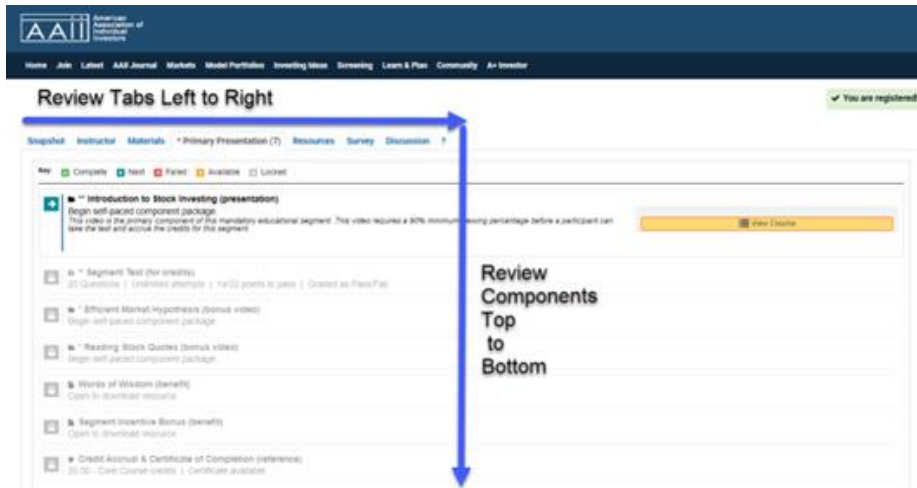
The information in this section is also located in the "Start Here" tab of each VES Class. Referenced videos and documents can be retrieved in the repository located at the bottom of this tab.



1. 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.



2. Each VES class should be completed like reading a book. Start with the upper-left section on the page and go from the top component to the bottom component in that section. After completing that section, please proceed to the next section (tab) to its immediate right.



3. Components in the "Primary Presentation" section contain the video, test, benefits, credits and certificate of completion. These components should be completed sequentially from the top to the bottom, as lower-level components will only be unlocked after completion of the components above them. For instance, you must view at least 90% of a presentation video before you can open the class test.
4. All the areas in a VES Class, including the presentation videos, will retain your progress. You do not have to finish an area or class in one session.
5. Presentation videos are provided in an interactive (SCORM) format for more effective learning. Because the videos are interactive, you may have to bypass a popup blocker message before the video will start.



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Highly Recommended Resources to Review before your FIRST Class (located in the Snapshot tab):

[How to Navigate a VES Class](#) - detailed instructions to effectively navigate and complete a VES Class. *Document or video format.*

[Completing a VES Class FAQs](#) - answers to the most frequently asked questions for completing a VES Class. *Document format.*

[Understanding the Interactive Video Controller](#) - instructions for starting and controlling advanced features of a video. *Document or video format).*

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### **Class Section (tab) Descriptions:**

**Snapshot:** An overview of the class topic, focus, requirements, and components.

**Instructor:** A biography and the contact information of the class instructor.

**Materials:** Education materials to be reviewed prior to, or with, the presentation video, to aid comprehension.

**Primary Present:** VES Class primary components, including the video, test, benefits, credits and Certificate of Completion.

**Resources:** Additional learning resources include books, articles, forms, spreadsheets, AI Tools, and related services.

Survey: Area for class participants to rate the instructor and the content of the class.

Discussion: Open forum area to post comments, ask questions, or interact with other participants on the class content.

"?": Resources and contact information to obtain assistance for VES offerings, AAIL membership and AI Tools.

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**Additional Resources (located at the bottom of the Snapshot tab in each class):**

[VES Class Welcome Video](#) - a welcome video that includes a broad overview of AAIL's Video Education Series.

[VES Agreement & Disclaimer](#) - a primary resource listing the terms and details for all AAIL VES offerings.

[VES General FAQs](#) - answers to the most frequently asked VES Class questions.

[VES Class Features & Highlights](#) - overview of all the features that are included with a VES Class.

[VES Class Video Icon Assistance Designations](#) - quick reference for identifying the icons in the class videos.

[Discussion Forum Rules and Guidelines](#) - rules and regulations for contributors to the discussion forum.

[Active Investing Workstation and AI Tools Overview](#) - reference for AI Tool-based VES Classes only.

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

For specific VES Class or EI Course-related questions, please contact the VES coordinator at: [ves@aail.com](mailto:ves@aail.com)

For purchases or a complete listing of VES Classes, VES Packages, the AAI's EI Course and their respective features and components, please go to: [www.aaii.com/ves](http://www.aaii.com/ves)

For general information on access, purchases or refunds for a VES Class or the EI Course, please contact AAI's Member Services at: [members@aaii.com](mailto:members@aaii.com)

For AAI membership or any other AAI-related product inquiries, please contact AAI's Member Services department at: [members@aaii.com](mailto:members@aaii.com)

For complete details, terms, rights and limitations with any VES Class, VES Package, or the AAI's EI Course, please access the "VES Agreement and Disclaimer" document at: [www.aaii.com/learn](http://www.aaii.com/learn)