

## **VES General FAQs**

### **What is AAI's Video Education Suite?**

AAI's Video Education Suite (VES) is a collection of professionally produced, full-featured interactive investment education classes delivered through a comprehensive learning management system (LMS).

### **Are all the VES offerings the same?**

All the VES offerings are composed of VES Classes. These can be a single VES Class, a VES Package containing two or more VES Classes focused on a single investment theme, or the AAI Essential Investing (EI) Course, which has all the available VES Classes. Each VES offering description page provides the details on what is included in each VES Class or the specific VES Classes within a VES Package. To see a list of AAI Video Education Suite offerings and the components and features of each VES Class, please go to [www.aai.com/ves](http://www.aai.com/ves).

### **If I have more questions or am having trouble purchasing or accessing a VES offering, who should I contact?**

For all purchase, processing, and accessibility questions and concerns, please contact AAI Member Services at [members@aai.com](mailto:members@aai.com).

### **Do I have to be an AAI member to register for and access a VES offering?**

AAI's mission as a nonprofit corporation is to assist all individual investors. Although we encourage everyone to become an AAI member, the complimentary and fee-based VES offerings are open to both AAI members and non-AAI members alike.

### **How do I register for a VES offering?**

To register for a complimentary or fee-based offering, go to [www.aai.com/ves](http://www.aai.com/ves). Add the VES offerings that you want to purchase to the shopping cart and then proceed to checkout. You are then required to enter some basic contact information (for the class delivery) and acknowledge that you have reviewed the Video Education Suite Agreement and Disclosure document. From there, you will be taken to the checkout area.

### **How do I pay for a VES offering, and are there any other fees?**

AAI accepts all major credit cards for VES offerings. If you have a promotion code, you can enter it in the checkout area. Sales tax is included in the listed price. When your total appears, you can complete processing. If you encounter any problems or have specific processing questions, please contact AAI Member Services at: [members@aai.com](mailto:members@aai.com).

### **After registering, how and where do I access my VES Class(es), VES Package or the EI Course?**

To access your VES Class(es), VES Package or the EI Course, please go to [www.aai.com/learn](http://www.aai.com/learn).

For step-by-step instructions on how to access and begin a VES Class, please view the “VES Class Getting Started” document or, preferably, watch the “How to Navigate and Complete a VES Class” video at: [www.aaii.com/learn](http://www.aaii.com/learn)

Provided that you are using only one login, all of your VES offerings will appear in the “My Classes” area of your account. The “My Classes” area is located in the menu on the right side of the AAI Learn home page. If your login information has recently changed (email address), please contact AAI Member Services at [members@aaii.com](mailto:members@aaii.com). VES Classes and credits from multiple accounts cannot be combined.

### **What is included in a VES Class?**

Each VES Class features an instructor’s presentation on a specific investment topic in their respective field of expertise. VES Classes generally include a high-definition interactive video, associated tools, educational material downloads, supplemental learning materials, speaker biography and contact information, presentation slides, a key terms and definitions worksheet, a Words of Wisdom document, a survey, a discussion forum, a test with credits for accrual, a class Certificate of Completion and a Segment Incentive Bonus (SIB) after completion. Not all VES Classes have all these features, so please review each VES Classes description page before registering.

### **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.

### **Are VES Classes and any accrued credits transferable?**

Accrued credits for completing a VES class will be added to the participant’s record and carried forward. For example, if a participant completes a VES class and then takes a future course that includes that class, the credits are automatically applied, and the class does not have to be retaken. Accrued credits may also be applied to future AAI offerings and opportunities.

### **Why are the presentation videos only accessible through AAI’s learning management system (LMS)?**

Utilization of an LMS to support videos for advanced learning is the educational industry standard for corporations and academic institutions. This format offers participants a seamless, comprehensive environment for improved learning. This format also supports professionally produced and interactive elements such as multitrack camera and multitrack HD video, stereo sound, embedded quizzes, a quick jump table of contents, word searchability, interactive hyperlinks, closed captioning and a host of advanced viewing controls. For more information on the advanced playback features, see the “Understanding the Interactive Video Controller” document and video at [www.aaii.com/learn](http://www.aaii.com/learn).

### **How do I know if a VES Class(es), VES Package or the EI Course is right for me?**

A detailed description page is available for each VES offering. Included on this page is a synopsis of the VES Class, the topic, the recommended investment level, the appropriate investor target, pre-class

educational suggestions, continuing education class recommendations, class tools, associated AAll products, the class duration, number of credits and a list of all the components and benefits within the offering. Additionally, a short video excerpt is included to ensure technical compatibility and satisfaction.

### **Do you offer any discounts or promotions and, if so, how do I apply for them?**

The most economical way to gain access to all the VES Classes is by purchasing the EI Course. VES Packages are also offered, which contain several VES Classes on a specific topic at a discounted price compared to buying each VES Class individually.

At specific times of the year and at live events, AAll may extend promotional offers for a VES offering. If you obtain a promotion code, enter it during checkout to apply the discount. It is important to note that all VES promotion codes have expiration dates, so please be sure to utilize any promotions prior to expiration.

### **How long do I have to complete a Video Education Suite offering after I sign up?**

Each participant will have one year to complete a VES Class, VES Package or the EI Course. This one-year access period applies to all the components and elements of the Video Education Suite except the AI Tools and the AI WorkStation. Access to the basic AI Tools is granted indefinitely, with many of those AI Tools being available on multiple platforms. Complimentary access to the AI WorkStation is limited to 120 days from the day a participant first accesses the AI WorkStation. The 120-day access to the AI WorkStation can begin anytime during a VES offering's access period.

In some instances, a single 60-day extension may be given to complete a VES offering. To request an extension of time, please contact AAll Member Services at: [members@aaii.com](mailto:members@aaii.com).

### **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](http://www.aaii.com/learn).

### **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.

## **What is the Essential Investing (EI) Course and will the course allow me to gain access to all of the VES Classes in the Video Education Suite?**

The EI Course is AAIL's most complete VES offering. The EI Course has two versions. The EI FlexiLearn Course is for individuals who would like to access the EI Course classes in any order, at any time, and who are not interested in the free trial, exam, certification, or course benefits. The second version is the EI Structured Course, which is the recommended format. This version contains sequential mandatory classes, an exam, "AAIL EI Course Certification, a certificate, and access to all the EI Course listed benefits. Both versions are automatically placed in a participant's dashboard at the time of purchase of the EI Course, and both versions can be accessed at any time. The EI Course versions include all the components of each VES Class. For more information on the EI FlexiLearn and Structured courses, please visit the primary EI Course webpage at: [www.aail.com/eicourse](http://www.aail.com/eicourse)

## **What is required to complete the EI Course and attain official AAIL EI Course Certification and all its associated benefits?**

EI Course Certification can only be obtained by completing the EI Structured Course. To complete the EI Structured Course, participants must complete the mandatory VES Classes and all the components of the course, including passing the EI Course Certification Exam. Complete details for EI Certification, testing, and related benefits can be found in the "VES Agreement and Disclaimer," the "EI Course Certification Benefits," and the "EI Course Certification Process" documents at [www.aail.com/learn](http://www.aail.com/learn).

## **What are some of the benefits of acquiring AAIL EI Course Certification?**

Participants who acquire EI Course Certification by completing the EI Structured Course will receive numerous AAIL benefits, such as complimentary product trials and discounted subscriptions to AAIL premium products, including AAIL membership, VIP status, and benefits at a future AAIL Investor Conference and an EI Course Certification certificate. A complete list of the currently available EI Course benefits can be found in the "EI Course Certification Benefits" document at [www.aail.com/learn](http://www.aail.com/learn).

## **Can I get a refund on the EI Course?**

Yes, purchasers of the EI Course are entitled to a 100% refund for 60 days from the original purchase date OR until the Course Continuation component is completed by accepting "Agree", whichever occurs first. Acceptance of and continuation of either the EI Structured Course or the EI FlexiLearn Course constitutes a forfeiting of the right to refund for the entire EI Course. For complete details, please see the VES Agreement and Disclaimer at [www.aail.com/learn](http://www.aail.com/learn).

## **Can I get a refund on an individual VES Class or a VES Package?**

Refunds are not available for individual VES Classes or VES Packages. VES Class and VES Package descriptions include comprehensive information on the instructor, topic, presentation video, AI Tools, and the included learning materials, along with a video clip for a thorough appraisal. Individuals considering the purchase of a VES Class or VES Package are encouraged to review these materials carefully prior to registration.

## **Who can access a purchased VES offering, and can it be viewed on multiple devices?**

Only the person who has registered for a VES offering has permission to access it. A registrant may view a VES offering from a maximum of two devices. The sharing of credentials or the reproduction of any elements or components contained within a VES offering (including on webinars or at AAIL Local Chapter meetings) is strictly prohibited. Any individual or group violating these terms will have their access suspended immediately, forfeiting all rights and refunds to this and other AAIL products, including memberships.

## **Can I download the VES Class, VES Package or the EI Course onto my computer, or do I need a live internet connection?**

VES offerings cannot be accessed offline. The Video Education Suite is housed in an online learning management system (LSM), so you will need an internet connection to access any VES offerings.

## **Are there any computer system requirements to take a VES Class(es), VES Package or the EI Course?**

Most users with a modern computer, an active internet connection, and an updated browser (with Flash enabled) should be able to access any Video Education Suite offering on either a Windows-based PC or a Mac (Apple). Videos should be viewable on most tablets, although an app, download or other adjustment may be needed in rare cases. Videos may also run on a smartphone-type device, but this is not recommended because screen size limitations may make the visual aspects illegible.

## **What are Active Investing (AI) Tools and how do they relate to a VES Class or the EI Course?**

AI Tools are investment-related tools that AAIL developed to assist investors with both the educational aspects of investing and real-world investing tasks. AI Tools cover numerous aspects of investing, including investment analysis, scanning, charting, strategy signals, risk management, execution types and timing, overall market analysis and much more. For more information, please see the “AI WorkStation Overview” document and the details on each individual AI Tool at: [www.aail.com/aitools](http://www.aail.com/aitools).

## **Are the AI Tools referenced in a VES Class description required to take the class?**

Some of the AAIL instructor-led VES Classes will reference an AI Tool or other AAIL offerings, but their inclusion is only to illustrate or support the educational aspects of the specific class. Participants do not need access to the AI Tools for the vast majority of VES Classes. All VES Classes that require an AI Tool to complete the class are clearly marked, and all of these are listed as and provided free of charge.