



Active Investing (AI) Tools & WorkStation Overview

The AAI Active Investing (AI) Workstation is a completely free and optional benefit that is included with certain VES Classes and the AAI Essential Investing Course. The availability of the AI Tools with or for a VES Class or the EI Course is not guaranteed and is subject to change. The AI Workstation contains several workspaces to assist course participants by providing them the opportunity to practice along with the VES Class or EI Course materials as they are being covered. Additionally, the AI Workstation provides participants with several workspaces that are ready for immediate use, showing real-world signals of strategies covered in the EI Course.¹

AI Workstation Overview

- The AI Workstation is provided completely free of charge for specific VES Classes and active EI Course participants ¹
- The AI Workstation is an optional accompaniment to specific VES Classes and the EI Course to assist with learning and comprehension of the material
- The AI Workstation is not a necessary component for EI Course Certification eligibility or benefits
- Unless noted (extremely rare), AAI's AI Workstation is not a necessary component to complete a VES Class and obtain the Certificate of Completion and the VES Classes credits
- The AI Workstation and its AI Workspaces have been specifically created and designed by the research and programming company Q-Primes in conjunction with AAI
- To access the AI Workstation, course participants must download the included VES Class or EI Course software onto their computers²

AI Workstation Benefits

- The AI Workstation includes AI Workspaces to follow along and learn with the VES materials
- AI Workspaces include tools for analysis, stock screens, charts and specialized indicators
- Many of the AI Workspace tools are customizable to each participant's preferences and needs
- AI Workspaces also include many of the actual strategies that are covered within the VES Classes and the EI Course
- The AI Workspace strategies can generate buy & sell signals on any stock that the user inputs
- The AI Workstation allows VES participants to set up a simulated account (fictitious dollars) and practice with the strategies to gauge their level of understanding and potential effectiveness

AI Workstation Platform

- The AI Workstation and the AI Tools run from within TradeStation's investment platform
- TradeStation comprises the brokerage firm TradeStation Securities and the education, research and investment platform TradeStation Technologies

- The TradeStation platform is being supplied completely free of charge by TradeStation for specific VES Classes and active EI Course participants³
- VES Class and EI Course participants are NOT required to open a TradeStation account and do not need to contact TradeStation to download and utilize the platform and the AI Workstation
- VES Class and EI Course participants will be supplied a unique username and password to access the AI Workstation if they so choose to download and utilize the software
- Detailed instructions, including a video with step-by-step instructions for the installation of the TradeStation platform, the AI Workstation and the AI Tools, will be provided
- By downloading the TradeStation platform, VES Class and EI Course participants will also gain access to TradeStation's comprehensive set of investing tools, including complimentary no-fee delayed data

AI Workstation Platform Post Course Access

- Upon expiration of the VES Class or EI Course, participants may continue to use all of the AAll Basic AI Tools completely free of charge as long as they have access to the TradeStation platform
- After the trial period of 120 days from a VES Class or EI Course participant first accessing the AI Workstation VES Class or EI Course trial period, if a participant desires to continue using the AI Workstation, they will be required to open a TradeStation account for continued access to the necessary TradeStation platform
 - TradeStation accounts may be opened with deposits as low as \$500
 - TradeStation accounts can be opened with no fees
 - TradeStation is offering a special cash incentive to all AAll EI Certified Course participants who open an account⁴
 - *Note: The opening of an account is a requirement imposed by the exchanges for investment data transmission.*

Symbol	Day Returns			Trade/Bit			Bid			Strgy Price			Ask	Side	Order	Order Consideration Analysis			Strategy	Potent Save	Take Cost	Spread Cost	Commission	Shares (Ref)	Spread Analysis	Sprea
NASDAQ 100 Index	\$ Change	% Change	Last	Last	Trade/Bit	Rid	Strgy Price	Ask	Side	Order	Order Consideration Analysis	Strategy	Potent Save	Take Cost	Spread Cost	Commission	Shares (Ref)	Spread Analysis	Sprea							
MLLI(HB)	\$66.16	5.3%	1,314.21	1,314.21	***	1,312.98	1,313.79	1,315.91	Buy	Limit	\$1313.79 - price could result in \$273.00 spread savings		\$273.00	\$273.00	\$273.00	\$1.00	100 Shrs	Spread Percentage	\$5.3%							
ORLY(HB)	\$3.75	0.4%	957.22	957.22	***	956.63	957.07	957.95	Buy	Limit	\$957.07 - price could result in \$192.00 spread savings		\$192.00	\$192.00	\$192.00	\$1.00	100 Shrs		\$1.92							
IDXX(HB)	\$8.74	1.6%	488.11	488.11	***	487.83	488.12	488.71	Buy	Limit	\$488.12 - price could result in \$88.00 spread savings		\$88.00	\$88.00	\$88.00	\$1.00	100 Shrs		\$0.88							
REGN	(\$3.10)	-0.4%	751.78	751.78	***	751.36	751.64	752.21	Buy	Limit	\$751.64 - price could result in \$85.00 spread savings		\$85.00	\$85.00	\$85.00	\$1.00	100 Shrs		\$0.85							
IRCC(HB)	\$13.92	2.7%	529.69	529.69	***	529.14	529.86	529.81	Buy	Limit	\$529.86 - price could result in \$67.00 spread savings		\$67.00	\$67.00	\$67.00	\$1.00	100 Shrs		\$0.67							
CTAS(HB)	\$4.82	1.6%	466.37	466.37	***	465.99	466.23	466.72	Buy	Limit	\$466.23 - price could result in \$73.00 spread savings		\$73.00	\$73.00	\$73.00	\$1.00	100 Shrs		\$0.73							
ALGN	\$4.35	1.4%	307.09	307.09	***	306.81	307.00	307.38	Buy	Limit	\$307.00 - price could result in \$57.00 spread savings		\$57.00	\$57.00	\$57.00	\$1.00	100 Shrs		\$0.57							
KUAC(HB)	\$11.13	3.0%	386.88	386.88	***	386.51	386.79	387.14	Buy	Limit	\$386.79 - price could result in \$53.00 spread savings		\$53.00	\$53.00	\$53.00	\$1.00	100 Shrs		\$0.53							
UPSI	\$4.29	1.4%	316.43	316.43	***	316.18	316.35	316.66	Buy	Limit	\$316.66 - price could result in \$59.00 spread savings		\$59.00	\$59.00	\$59.00	\$1.00	100 Shrs		\$0.59							
INTU	\$8.53	1.3%	433.21	433.21	***	432.83	433.24	433.57	Buy	Limit	\$433.24 - price could result in \$49.00 spread savings		\$49.00	\$49.00	\$49.00	\$1.00	100 Shrs		\$0.49							
AVGO	\$5.16	0.6%	623.69	623.69	***	623.46	623.55	623.98	Buy	Limit	\$623.55 - price could result in \$46.00 spread savings		\$46.00	\$46.00	\$46.00	\$1.00	100 Shrs		\$0.46							
IBM	\$11.46	0.9%	295.72	295.72	***	295.53	295.69	295.82	Buy	Limit	\$295.69 - price could result in \$19.00 spread savings		\$19.00	\$19.00	\$19.00	\$1.00	100 Shrs		\$0.19							
CHTR(HB)	(\$0.08)	-0.6%	338.92	338.92	***	338.61	338.74	339.01	Buy	Limit	\$338.74 - price could result in \$40.00 spread savings		\$40.00	\$40.00	\$40.00	\$1.00	100 Shrs		\$0.40							
BID	(\$1.21)	-0.4%	312.79	312.79	***	312.52	312.74	312.97	Buy	Limit	\$312.74 - price could result in \$35.00 spread savings		\$35.00	\$35.00	\$35.00	\$1.00	100 Shrs		\$0.35							
ASML(HB)	\$17.36	2.7%	660.35	660.35	***	659.96	660.01	660.22	Buy	Limit	\$660.01 - price could result in \$32.00 spread savings		\$32.00	\$32.00	\$32.00	\$1.00	100 Shrs		\$0.32							
ADBE	\$7.44	2.2%	350.09	350.09	***	349.96	350.03	350.16	Buy	Limit	\$350.03 - price could result in \$20.00 spread savings		\$20.00	\$20.00	\$20.00	\$1.00	100 Shrs		\$0.20							
SNPS(HB)	\$5.13	1.4%	372.08	372.08	***	371.98	372.09	372.30	Buy	Limit	\$372.09 - price could result in \$32.00 spread savings		\$32.00	\$32.00	\$32.00	\$1.00	100 Shrs		\$0.32							
AMSS(HB)	\$4.52	1.5%	298.17	298.17	***	297.96	297.96	298.16	Buy	Limit	\$297.96 - price could result in \$30.00 spread savings		\$30.00	\$30.00	\$30.00	\$1.00	100 Shrs		\$0.30							
COST	\$0.77	0.2%	501.56	501.56	***	501.43	501.51	501.66	Buy	Limit	\$501.51 - price could result in \$23.00 spread savings		\$23.00	\$23.00	\$23.00	\$1.00	100 Shrs		\$0.23							
ISRG	\$1.28	0.4%	303.83	303.83	***	302.68	302.77	302.95	Buy	Limit	\$302.77 - price could result in \$27.00 spread savings		\$27.00	\$27.00	\$27.00	\$1.00	100 Shrs		\$0.27							
LULU	\$2.76	0.7%	384.20	384.20	***	384.06	384.14	384.31	Buy	Limit	\$384.14 - price could result in \$25.00 spread savings		\$25.00	\$25.00	\$25.00	\$1.00	100 Shrs		\$0.25							
ADSK	\$2.63	1.4%	195.36	195.36	***	195.22	195.28	195.41	Buy	Limit	\$195.28 - price could result in \$19.00 spread savings		\$19.00	\$19.00	\$19.00	\$1.00	100 Shrs		\$0.19							
TEAM	\$9.33	2.6%	336.69	336.69	***	336.59	336.66	336.89	Buy	Limit	\$336.66 - price could result in \$19.00 spread savings		\$19.00	\$19.00	\$19.00	\$1.00	100 Shrs		\$0.19							
YRKB	\$3.72	1.8%	215.12	215.12	***	215.04	215.10	215.23	Buy	Limit	\$215.10 - price could result in \$19.00 spread savings		\$19.00	\$19.00	\$19.00	\$1.00	100 Shrs		\$0.19							
FANG(HB)	(\$1.67)	-1.5%	130.94	130.94	***	130.85	130.96	131.01	Buy	Limit	\$130.96 - price could result in \$16.00 spread savings		\$16.00	\$16.00	\$16.00	\$1.00	100 Shrs		\$0.16							
WIDAY	\$1.17	0.7%	179.60	179.60	***	179.56	179.55	179.73	Buy	Limit	\$179.55 - price could result in \$15.00 spread savings		\$15.00	\$15.00	\$15.00	\$1.00	100 Shrs		\$0.15							
EA	(\$0.21)	-0.2%	125.20	125.20	***	125.13	125.18	125.27	Buy	Limit	\$125.18 - price could result in \$14.00 spread savings		\$14.00	\$14.00	\$14.00	\$1.00	100 Shrs		\$0.14							
MRNA	(\$1.09)	-0.6%	122.69	122.69	***	122.56	122.60	122.67	Buy	Limit	\$122.60 - price could result in \$11.00 spread savings		\$11.00	\$11.00	\$11.00	\$1.00	100 Shrs		\$0.11							
VYTX(HB)	\$6.28	1.8%	351.11	351.11	***	350.92	350.97	351.06	Buy	Limit	\$350.97 - price could result in \$14.00 spread savings		\$14.00	\$14.00	\$14.00	\$1.00	100 Shrs		\$0.14							
INPI	\$2.90	1.8%	167.99	167.99	***	167.92	167.96	168.05	Buy	Limit	\$167.96 - price could result in \$13.00 spread savings		\$13.00	\$13.00	\$13.00	\$1.00	100 Shrs		\$0.13							
AMGN	(\$1.37)	-0.6%	233.06	233.06	***	233.00	233.04	233.13	Buy	Limit	\$233.04 - price could result in \$13.00 spread savings		\$13.00	\$13.00	\$13.00	\$1.00	100 Shrs		\$0.13							
DLTR(HB)	(\$1.41)	-0.9%	153.76	153.76	***	153.69	153.73	153.82	Buy	Limit	\$153.73 - price could result in \$13.00 spread savings		\$13.00	\$13.00	\$13.00	\$1.00	100 Shrs		\$0.13							
ENPH	\$1.94	1.2%	159.77	159.77	***	159.69	159.73	159.82	Buy	Limit	\$159.73 - price could result in \$13.00 spread savings		\$13.00	\$13.00	\$13.00	\$1.00	100 Shrs		\$0.13							
NFLX	\$2.34	0.7%	334.48	334.48	***	334.37	334.39	334.44	Buy	Market	Market MAY be appropriate limit spread, low savings		\$7.00	\$6.00	\$7.00	\$1.00	100 Shrs		\$0.07							
PAYC(HB)	\$0.13	0.1%	107.38	107.38	***	107.31	107.35	107.48	Buy	Limit	\$107.35 - price could result in \$13.00 spread savings		\$13.00	\$13.00	\$13.00	\$1.00	100 Shrs		\$0.13							
CDNS	\$1.13	0.6%	205.16	205.16	***	205.04	205.08	205.17	Buy	Limit	\$205.08 - price could result in \$13.00 spread savings		\$13.00	\$13.00	\$13.00	\$1.00	100 Shrs		\$0.13							
SDEN	\$0.25	0.1%	200.25	200.25	***	200.20	200.29	200.47	Buy	Limit	\$200.29 - price could result in \$17.00 spread savings		\$17.00	\$17.00	\$17.00	\$1.00	100 Shrs		\$0.17							
PANW	\$8.26	2.7%	201.13	201.13	***	201.10	201.14	201.21	Buy	Limit	\$201.14 - price could result in \$11.00 spread savings		\$11.00	\$11.00	\$11.00	\$1.00	100 Shrs		\$0.11							
DXCM	\$0.91	0.8%	120.56	120.56	***	120.54	120.57	120.63	Buy	Market	Market MAY be appropriate limit spread, low savings		\$9.00	\$10.00	\$9.00	\$1.00	100 Shrs		\$0.09							
CRWD	\$3.22	4.6%	135.16	135.16	***	135.10	135.19	135.26	Buy	Limit	\$135.19 - price could result in \$10.00 spread savings		\$10.00	\$10.00	\$10.00	\$1.00	100 Shrs		\$0.10							
HON	(\$0.18)	-0.1%	196.95	196.95	***	196.78	196.81	196.88	Buy	Limit	\$196.81 - price could result in \$10.00 spread savings		\$10.00	\$10.00	\$10.00	\$1.00	100 Shrs		\$0.10							



For detailed information and a comprehensive listing of resources on the AI Workstation or an AI Tool, please go to: www.aaii.com/aitools

For specific questions related to the AI Workstation or an AI Tool, please contact the AI Tool coordinator at: aitools@aaii.com

To initiate a purchase of a specific AI Tool or to research their respective features, please go to: www.aaii.com/aitools

For general information on access, purchases, and refunds for an AI Tool, please contact AAII Members Services at: members@aaii.com

For more information, please access the VES Agreement & Disclaimer document at: www.aaii.com/learn

Please do not contact TradeStation regarding any AAII VES Class or AAII EI Course-related matters.

© 2024 The American Association of Individual Investors, 625 N. Michigan Ave., Chicago, IL 60611; (312) 676-4300; www.aaii.com

¹ This document contains general information regarding AAII's AI Workstation. For more details, please go to the "VES Agreement & Disclaimer" document at: www.aaii.com/aitools

² For recommended computer system requirements, please see the "AI Workstation System Requirements" document at: www.aaii.com/aitools

³ AAII does NOT receive any financial considerations from TradeStation for use of the TradeStation platform or the AI Workstation

⁴ For complete details on this special offer, please see the "TradeStation's AAII Certified AI Course Offer" document at: www.aaii.com/aitools

© 2024 The American Association of Individual Investors, 625 N. Michigan Ave., Chicago, IL 60611; (312) 676-4300; www.aaii.com.

