

Get your team up to speed

ON THE ALTERNATIVE INVESTMENT LANDSCAPE

Fundamentals of Alternative Investments® Certificate Program

Alternative investments, once reserved for the ultra-wealthy or institutional investor, are now accessible to all investors. New instruments and asset classes, including liquid alternatives such as ETFs and alternative mutual funds, are making portfolio construction more complex —while adding options for returns and protections against downside risk.

Naturally, your clients want to know more and are looking to your advisors for guidance. CAIA Association, the global leader in alternative investment education, has created a professional development, core training program to answer that need.

- ✓ **CE credits earned for CIMA, CIMC, CPWA and CFP designations, IIROC, CISI qualification, and NASBA**
- ✓ **Enrollment Open Year Round**

BENEFITS INCLUDE

20 one-hour, self-paced **ONLINE MODULES**

Expert research and instruction **via VIDEO**

10-QUESTION QUIZ after each module to evaluate understanding

CERTIFICATE awarded upon completion

CONTINUING EDUCATION credits offered

Fundamentals of Alternative Investments

CAIA ASSOCIATION®

PRICING
Individuals: US $895
Groups starting at: US $695

LEARN MORE
View a demo or enroll **at CAIA.org/programs**



Practical. Affordable. Relevant. Convenient.

The Fundamentals of Alternative Investments provides a foundation of core concepts in alternative investments. The 20-hour, self-paced course is taught by leading experts in alternative investments in an engaging, conversational way to provide a working knowledge of alternative investments.

FUNDAMENTALS INCLUDE

1. **Traditional vs. Alternative Investments**
2. **Investment Returns & Risks**
3. **Correlation & Efficient Frontiers**
4. **Portfolio Management & Asset Allocation**
5. **Due Diligence**
6. **Risk Management**
7. **Hedge Funds 1:** Structure, Categories & Biases
8. **Hedge Funds 2:** Relative Value & Event Driven Strategies
9. **Hedge Funds 3:** Macro & Managed Futures Strategies
10. **Hedge Funds 4:** Equity Strategies
11. **Hedge Funds 5:** Funds of Funds
12. **Real Assets 1:** Timberland, Farmland & Intellectual Property
13. **Real Assets 2:** Real Estate Equity & Debt Markets
14. **Private Equity 1:** Introduction & Performance Analysis
15. **Private Equity 2:** LBO, VC & Debt Strategies
16. **Commodities 1:** Markets & Inflation Protection
17. **Commodities 2:** Beta Products, Alpha Products & Benchmarks
18. **Structured Products 1:** Credit Default Swaps
19. **Structured Products 2:** Collateralized Debt Obligations
20. **Capstone:** The Risks & Rewards of Alternative Investments

Bonus Topics:
Liquid Alternative Investments
Opportunities in Private Credit Investing
Environmental, Social, Governance Investing

Candidates completing all program modules will earn 20 hours of continuing education credits for the following designations: CIMA®, CIMC®, and CPWA® awarded by IMCA. CFP® awarded by CFP® board and 20 CPE credits for NASBA and CISI qualification. CECAP accredited for IIROC CE credit. No partial credit will be given. Participants will have 11 months from date of purchase to complete the course.

CAIA ASSOCIATION®

ABOUT CAIA ASSOCIATION

The Fundamentals of Alternative Investments certificate program was developed by the Chartered Alternative Investment Analyst (CAIA) Association, the global leader in alternative investment education, in collaboration with the Investment Management Consultant Association® (IMCA), experts in investment consulting and in wealth management education. Since 2002, the CAIA Association is best known for the CAIA Charter, an internationally recognized credential, granted only upon successful completion of a rigorous two-level exam series, combined with relevant professional experience.

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