

FUNDAMENTALS OF ALTERNATIVE INVESTMENTS CERTIFICATE PROGRAM

UNIFI BY CAIA™

FOR THE INDUSTRY, BY THE INDUSTRY.

The Fundamentals of Alternative Investments (FAI) Certificate Program —
the definitive standard in wealth management alts education.

WHY WEALTH MANAGEMENT PROFESSIONALS NEED (AND WANT!) TO LEARN ABOUT ALTS.

Beyond the traditional expectations of industry education programs, the Fundamentals Certificate Program immerses you in the client's experience, adopting a goals-based approach to clarify the role of these strategies in achieving client objectives.

Understand “the language of your client” regardless of your role within the industry. This certificate is your gateway to understanding these complex strategies. Whether you work in business development or are a financial advisor with client relationships, this program will elevate your conversations, ensuring everyone speaks the same language toward meeting your clients' goals.

TODAY'S WEALTH MANAGEMENT PORTFOLIO: A NEW VANTAGE POINT

The Fundamentals Certificate Program introduces alternative investments through the lens of client goals, portfolio suitability, and effective implementation. Comprised of 8 online modules, the program covers foundations, strategy introductions, and portfolio applications and **is eligible for 15 Continuing Education (CE) credit hours.**

Foundations provide key insights into definitions, risk, return, and fund vehicles. Strategy Introductions categorize alternatives by risk and return driver, and address characteristics, risks, and portfolio integration. And Portfolio Applications focuses on allocation methods, liquidity management, and client expectations.



Foundations

- Module 1: An Introduction to Alternative Investments
- Module 2: Risk and Return of Alternative Investments
- Module 3: Accessing Alternative Investments

Strategy Introductions

- Module 4: Equity Strategies
- Module 5: Credit Strategies
- Module 6: Real Assets Strategies
- Module 7: Diversifying Strategies

Portfolio Applications

- Module 8: Portfolio Implementation

PROGRAM HIGHLIGHTS

- Gain Alternative Investments knowledge for just US\$795! Full-time students are eligible for discounted rates. Email unifi@caia.org for details.
- Online, self-paced, video-based program
- To complete the program, a 70% pass rate is required on end-of-module quizzes.
- 15 CE credits, certificates, and digital badges awarded upon completion

Collective growth starts with you! For group enrollment information [click here](#).

GETTING STARTED

It's simple. To start the program, go to: <https://unifi.caia.org>.

- 1) Click "Enroll in Fundamentals".
- 2) Select "UniFi by CAIA™ Fundamentals of Alternative Investments Certificate Program" and "Added to Cart".
- 3) Click "Proceed to Checkout". If you do not have an account, click "Sign Up" and then click "Proceed to Checkout".