



CPE CREDITS FOR INSIDE INVESTMENT MANAGEMENT

The *Inside Investment Management* course is part of PSI's *Inside Financial Services*® curriculum and provides a fundamental understanding of the investment management segment of the industry.

Upon completing this course, students will be able to:

- Name investment management customers
- List different types of investment management providers
- Recall investment management products and services
- Recognize important executives within investment management
- Identify the challenges facing the investment management industry

ELIGIBILITY

If you are a CPA licensed in the United States, you may be eligible for Continuing Professional Education credit for this course. This course offers 1 CPE credit.

Performance Solutions International (PSI) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.NASBARegistry.org.

CPE COMPLETION REQUIREMENTS

To gain CPE credit, you must complete the course and prove successful completion by passing the Final Test (with a 70% grade or better) within one-year from the date of purchase. PSI will track your purchase date and completion date and enforce this policy. If your company licenses the program and PSI hosts it, PSI will track your initial log-on date and only award CPE credit if you complete the course and pass the test within one year of your first log-on to the course.

PROGRAM INFORMATION

This course provides a Basic Level of knowledge for anyone new to the industry or who wants a big-picture understanding and offers credit in the Specialized Knowledge field of



study. There are no course prerequisites or advanced preparation necessary to complete this course.

DELIVERY METHOD

QAS Self-Study. The course is delivered either via PSI's hosted site or a company's internal learning management system.

PROGRAM REVIEW

PSI reviews the program content to ensure that it remains current. This version of the course was updated in February 2026.

REFUND AND COMPLAINT POLICY

If you are not completely satisfied with this course, contact PSI at info@goto-psi.com and discuss your complaints. All incoming complaints are documented and forwarded to the Administrator. After resolution, documentation is kept in a complaint file for five years and used for consideration during course updates and improvements.

If you are not completely satisfied with the program within 30 days of purchase, PSI will refund your money (for individual users only). If you are an organization wishing to license the program and wish to discuss PSI's refund policy, please contact Christopher Lawton at clawton@goto-psi.com. A refund policy will be discussed and agreed upon. PSI would like to ensure you are fully satisfied with our services and will refund your money if you are not entirely satisfied.

PROGRAM REGISTRATION REQUIREMENTS

Contact PSI directly at 1 (866) GOTO-PSI to register. If this program is offered through your company, please contact your training administrator for registration details. They will arrange to obtain a licensed copy for you through PSI.

To contact a PSI account executive to discuss pricing and the options for your organization, please call our toll-free number at 1-866-GOTO-PSI (1-866-468-6774) and select option # 1. You can also e-mail us at info@goto-psi.com. You can also visit our website at www.goto-psi.com for additional information on our company and services.

Performance Solutions International is pleased to have this opportunity to assist our clients in achieving their goals within the financial services industry. Please let us know if you have any comments on our approach or program, or if you would like to recommend any improvements.

Our goal is to increase your industry IQ!