

PRODUCT BRIEF

# Financial Markets Product and Continuing Professional Education (CPE)

Black Diamond is partnered with the SS&C Learning Institute to provide your firm with seamless access to industry courses approved for CPE credits.

## What is the SS&C Learning Institute?

The SS&C Learning Institute is a division of SS&C providing education and training to SS&C's clients. Our flagship product is the GAMMA Library including 250+ online courses spanning 25+ financial markets topics. The eLearning courses within each topic contain introductory, intermediate, and advanced content accredited for various industry CPE credits, including CIMA®, CFP®, CPA®, and IARCE.

From online courses approved for CPE credits to timely articles and videos on hot topics, the Learning Institute helps to develop your greatest asset—your people.



## How can I access this new content?

SS&C Black Diamond® Wealth Solutions users have complimentary access to 10 courses from the GAMMA Library, so you can experience the content and earn CPE credits if you have an industry designation. From the Connections link, click on the SS&C Learning Institute logo to gain access to the following courses within the topic areas of Financial Advisory and Investment Basics:

- ESG Investing
- Exchange-Traded Funds
- Exchange-Traded Funds – Types
- Investing in Bonds
- Investing in Equity
- Investing in Hedge Funds
- Investing in Money Market Instruments
- Robo-Advisors
- Separately Managed Accounts
- Smart Beta and Factor Models

## How do I obtain CPE credits?

If you have a professional designation, please refer to the CPE Credit Listing below to view the various designations available. Once you complete one of the listed courses and pass the final test with a mastery score of 70%, simply fill out the Certification Form for CPE Credits on the SS&C Learning Institute platform and email it to [SSCLI\\_Support@sscinc.com](mailto:SSCLI_Support@sscinc.com) to obtain credit.

### CPE Credit Listing

	AAMS <sup>®</sup> , CRPC <sup>®</sup> , CRPS <sup>®</sup>	AFIM <sup>®</sup> , CWS <sup>®</sup>	AIF <sup>®</sup> , AIFA <sup>®</sup> , PPC <sup>®</sup>	CFIRS <sup>®</sup>	C(k)P <sup>®</sup>	CFP <sup>®</sup>	CFS <sup>®</sup>	CIDA <sup>®</sup>	CIMA <sup>®</sup> , CIMC <sup>®</sup> , CPWA <sup>®</sup> , RMA <sup>®</sup>	CLU <sup>®</sup> , ChFC <sup>®</sup> , FSCP <sup>®</sup> , WMCP <sup>®</sup>	CPA <sup>®</sup>	CPCU <sup>®</sup>	CPM <sup>®</sup>	CRPP <sup>®</sup>	IAR
<a href="#">Alternatives Investments</a>	1	1		1	1	1	1	1	1		1		4	1	
<a href="#">Asset Allocation</a>	1	1	1	1		1	1	1	1		1		4	1	
<a href="#">Credit Analysis for High-Net-Worth Individuals</a>	1	1		1		1	1	1	1		1		4	1	
<a href="#">Introduction to Performance Measurement</a>	1	1	1	1		1	1	1	1		1				1
<a href="#">Introduction to Performance Management</a>	2	2		2	2	1	2	1	2	1.5	2	3	4	2	
<a href="#">Investing Bonds</a>	1	1		1		1	1	1	1		1				1
<a href="#">Managing Client Expectations</a>	1	1	1	1		1	1	1	1		1		4	1	
<a href="#">Financial Products for Investors</a>	1	1		1		1	1		1		1		4	1	
<a href="#">Algorithmic Trading</a>		1			1				1				4	1	
<a href="#">Robo-Advisors</a>		1			1	1	1		1					1	1

\*NASAA IAR CE credits carry a reporting fee of \$35, which covers the six credit requirement for the Products and Practices component.

Note: We also generate generic completion certificates for users to self-report for professional organizations that do not offer external accreditation but do accept external sources of professional learning (e.g. The CFA Institute).

## For more information

**If you have questions or if your firm would like to license additional content from the GAMMA Library, please reach out to your service representative or our SS&C colleague at The Learning Institute, Natalie Ramos, [nramos@sscinc.com](mailto:nramos@sscinc.com).**

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