

The logo for SunGard Wealth Management University is displayed in white text on a dark purple background. To the left of the text is a black and white photograph of a modern building's interior with large glass windows and structural beams. To the right of the text is a vertical bar composed of several thin, parallel lines in various colors including red, orange, yellow, green, and blue.

# SUNGARD WEALTH MANAGEMENT UNIVERSITY

## WEALTH MANAGEMENT UNIVERSITY

**A comprehensive professional development and training solution to help improve productivity**

SunGard's Wealth Management University is a professional development and training solution for financial advisors, bank and trust professionals, and benefit administrators. Wealth Management University can help firms accomplish several goals at once, by offering a method for training employees on industry topics, a method to obtain product training on SunGard's wealth management solutions, and a resource to earn continuing education credits for professional designations.

Wealth Management University's streamlined training delivery helps improve employees' productivity by simplifying the educational process. It automatically tracks and reports on the completion of coursework, offers an accredited continuing education (CE) curriculum, and helps build the knowledge wealth management professionals need to work with sophisticated clients, navigate fiduciary law and grow their business.

As the face of wealth management changes and evolves, so does the dynamic content that makes up SunGard's Web-enabled curriculum. A fully functional learning management system, Wealth Management University fills your training and professional development needs with fluid, current content. Managed and supported by SunGard, educational topics are organized in program tracks designed and delivered by proven experts in wealth management and its practical application.

## DELIVERING PROFESSIONAL DEVELOPMENT AND EDUCATION AND REPORTING EFFICIENCIES

SunGard's Wealth Management University serves as a single solution for your professional development and product training needs. With Wealth Management University working for you, the introduction of new educational topics and training schedules throughout your organization is streamlined and more consistent. Wealth Management University introduces various efficiencies, by helping decrease the time you spend planning training and continuing education content, as well as simplifying tracking and reporting.

You no longer need to spend time searching for educational options when you can access one source through SunGard's Wealth Management University. Courses are delivered via the Web, helping your organization save travel time and expenses, as well as giving employees flexibility regarding when and where they complete their training.

### WEALTH MANAGEMENT UNIVERSITY HELPS:

- Improve productivity and efficiency by offering a single source for the education of wealth management professionals
- Increase transparency through automated reporting and tracking
- Improve retention of wealth management professionals by showing commitment to employee development
- Save time and travel expenses via Web delivery
- Meet governance, risk and compliance requirements

## INVESTING IN YOUR PEOPLE AND CHOOSING A CURRICULUM

SunGard's Wealth Management University educational solution helps reinforce your organization's commitment to employees' professional growth and career development. As you invest in your people, they become more invested in your organization, which can help increase productivity and improve retention. Wealth Management University is organized by industry role, offering a set of courses most applicable to your organization's needs, but is flexible enough that you can customize your own curriculum, helping your employees and your business to grow.

- The **Bank Trust Series** provides instruction in the core areas of trust administration and fiduciary law. Offered in three progressive tracks, this set of courses builds the knowledge and confidence needed to work with high net worth clients, deliver superior client service, and expand your organization's trust business. Each track can be completed individually and each course carries continuing education credits for AIB, ICB and CFP.
- The **Financial Advisor Series** includes a comprehensive set of courses on financial planning, investment products, and ethics. The series provides current content to help advisors meet governance, risk and compliance requirements and can contribute to a firm element training program. Consisting of two tracks, the Cornerstone track contains courses that are relevant for all advisors, while the Capstone track is geared to more complex topics for the more advanced advisor. Many of the courses in this series carry continuing education credits for CFP, with enough hours to meet the minimum requirements to maintain a CFP designation.
- The **Retirement Services Series** provides a curriculum focused on qualified retirement plans, including a track for general concepts to new plan recordkeepers, service personnel, or sales representatives, and a more advanced track designed for experienced associates moving into an administrative or consulting role. In addition to general concepts of qualified retirement plans, the courses incorporate the latest legislative developments affecting the pension industry. These courses have been designed to meet continuing education requirements of the ASPPA continuing education programs. In addition to industry training, this series offers product training for SunGard's Omni and Relius solutions.

Wealth Management University includes the flexibility to subscribe to full topic areas, specific curriculum or a la carte programs. You can choose from several available packages, or create your own, custom curriculum from Wealth Management University's many offerings (course minimums apply):

- **Series Curriculum** — A two-year subscription, this curriculum gives your organization access to one of the Series within Wealth Management University's offerings.
- **Track Curriculum** — A subscription to only one of the tracks within a Series allows you the flexibility to choose the set of courses most applicable to your firm's needs.
- **Custom Curriculum** – A subscription to a customized course set of your choosing, including multiple tracks from across a Series, or individual courses from all of Wealth Management University's offerings.

## FIND OUT MORE

Because Wealth Management University and its curriculum are evolving continually, the best way to learn more about its current offerings for wealth management professionals is to contact your SunGard account representative or visit [www.sungard.com/wmuniversity](http://www.sungard.com/wmuniversity).

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