



# Training Events

Click on the name of the training course and complete the requested registration information. Shortly thereafter, you will receive an iCalendar email with the URL you will use to access the training. Please be sure to write down or remember the **username** and **password** you set up with registration.

July 2014

Monday	Tuesday	Wednesday	Thursday	Friday
	<b>1</b>  <b>3:00 PM CT</b> Advisor Directed <u>101: Building Models</u>	<b>2</b>  <b>3:00 PM CT</b> Advisor Directed <u>102: Trading</u>	<b>3</b>  <b>11:00 AM CT</b> Advisor Directed <u>103: Advanced Tips</u>	<b>4</b>  <b>Independence Day</b>
<b>7</b>  <b>3:00 PM CT</b> <u>Getting Started with</u> <u>Envestnet</u>	<b>8</b>  <b>3:00 PM CT</b> <u>Running Your First</u> <u>Proposal</u>	<b>9</b>  <b>3:00 PM CT</b> <u>Servicing Client</u> <u>Accounts</u>	<b>10</b>  <b>3:00 PM CT</b> <u>Running Reports</u>	<b>11</b>  <b>11:00 AM CT</b> <u>UMA Overview</u>
<b>14</b>  <b>3:00 PM CT</b> <u>Getting Started with</u> <u>Envestnet</u>	<b>15</b>  <b>3:00 PM CT</b> Advisor Directed <u>101: Building Models</u>	<b>16</b>  <b>3:00 PM CT</b> Advisor Directed <u>102: Trading</u>	<b>17</b>  <b>3:00 PM CT</b> Advisor Directed <u>103: Advanced Tips</u>	<b>18</b>  <b>11:00 AM CT</b> <u>Updating Your</u> <u>Client's Portfolio</u>
<b>21</b>  <b>3:00 PM CT</b> <u>Getting Started with</u> <u>Envestnet</u>	<b>22</b>  <b>3:00 PM CT</b> <u>Running Your First</u> <u>Proposal</u>	<b>23</b>  <b>3:00 PM CT</b> <u>Servicing Client</u> <u>Accounts</u>	<b>24</b>  <b>3:00 PM CT</b> <u>Running Reports</u>	<b>25</b>  <b>11:00 AM CT</b> <u>UMA Overview</u>
<b>28</b>  <b>3:00 PM CT</b> <u>Getting Started with</u> <u>Envestnet</u>	<b>29</b>  <b>3:00 PM CT</b> Advisor Directed <u>101: Building Models</u>	<b>30</b>  <b>3:00 PM CT</b> Advisor Directed <u>102: Trading</u>	<b>31</b>  <b>3:00 PM CT</b> Advisor Directed <u>103: Advanced Tips</u>	