

Elucidation CE

Busy professionals are all too familiar with the struggle to balance ever increasing demands on their time. Continuing education is essential to financial planners, but meeting the requirements laid down by NASD adds a major load to an already crowded personal schedule.

Elucidation CE provides a sophisticated tool for delivering continuing education on-line through the Internet. When Elucidation CE is in place, both broker-dealers and their financial planners see significant benefits.

Broker-Dealers...

Set up the courses and tests

Elucidation CE provides an open framework in which the broker-dealer can install their own course content or content from a third party courseware developer.

The testing facility supports the ability to define for a course any number of test questions and then to specify how many questions are included in the test. When the pool of test questions is greater than the number of questions used in each test, the system can randomly select test questions from the pool, so every planner sees something different, and a planner retaking a test sees at least some new questions.

Determine credit requirements and deadlines

The system provides a comprehensive suite of administrative functions that allow supervisors to define course groups and associate requirements with either groups or individual planners.

Know what's happening

The system provides a flexible reporting capability giving supervisors the ability to easily track overall group status as well as individual performance. System usage may be tracked and reported for billing back planners when that's appropriate.

Planner status tracking can be structured to reflect your organizations's supervisory and/or marketing structure. Built-in email capabilities make it easy to communicate with groups of planners.

The hierarchical security built into Elucidation CE ensures that each level of supervision has access and control only within its appropriate sphere. Headquarters system administrators have access to the entire system so they can ensure the integrity of the whole process.

Can control the process

Elucidation CE's reporting gives management insight into what's happening and Elucidation CE's emailing facility gives them the ability to address messages to whole groups of planners based on criteria such as course completion status.

Keep their costs under control

Elucidation CE is designed for organizations the size of a broker-dealer. The system is powerful enough to carry the load and small enough to be easily manageable. The system is hosted by Elucidation, Inc. eliminating any need to deal with the underlying technology.

Financial Planners...

Know what's required of them

Every individual planner is registered on the system. When he or she logs on, a personal status page shows what courses are required, which have been completed, and the required completion dates for all uncompleted courses.

Set their own schedules

Courses can be taken in any order. A planner can stop in the middle of a course and return to finish later. A planner can print the text of a course to study off-line, if that's more convenient. Tests can be taken immediately after a course is completed or later. A planner can even leave in the middle of a test and come back later to continue from where he or she left off.

Get immediate feedback

Tests are graded when they are taken. A planner is told at once whether he passed or not. Tests may even be set up to provide feedback on a question by question basis, so the planner learns why a particular answer is incorrect.

Get credit for courses taken outside the system.

The system can be set up to allow the entry – with proper authorization, of course – of credits obtained elsewhere. Once entered, these course credits are tracked and reported along with regular courses.

Personal information is kept private.

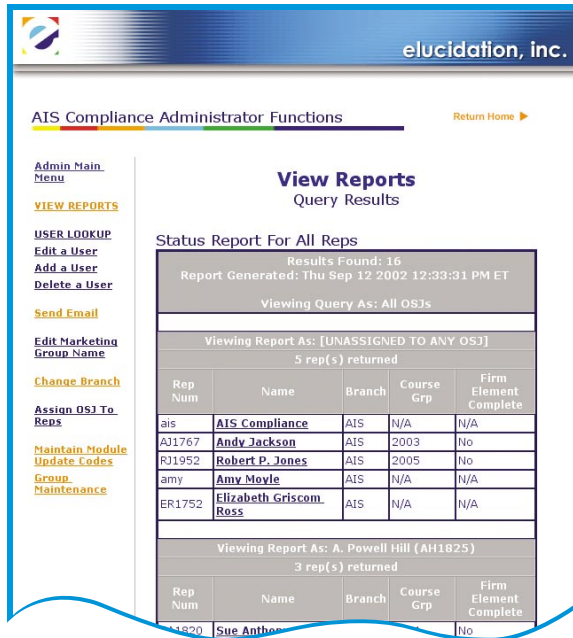
Elucidation CE is built on a sophisticated, hierarchical security system. A planner can see his own information and nobody else's. Supervisors can monitor planners within their area of responsibility and no others. Up to five levels of hierarchy can be set up to accommodate local offices, regions, and branches of the overall organization.



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A Look Inside Elucidation CE

Elucidation CE is a full featured engine for delivering continuing education courses through the Internet. Courseware set up by a broker-dealer is delivered on-line to individual planners.



System administrators have complete control over courseware content and curriculum requirements. They can create and modify tests and set criteria for passing. Administrators can define course groups to simplify the task of assigning differing requirements to groups of planners.

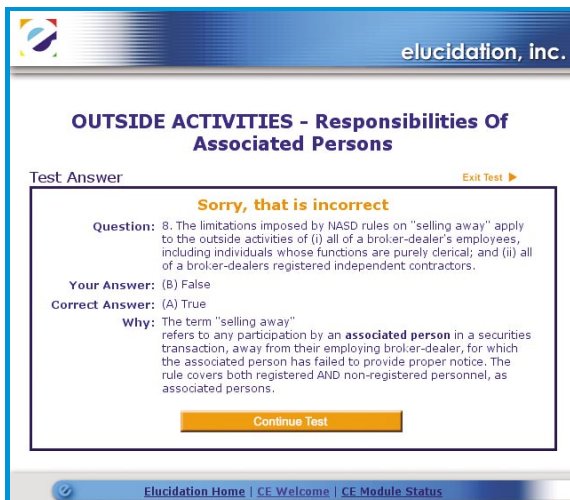
On-line queries provide immediate, up-to-date status information, and reporting can be organized to reflect a BD's supervisory and/or marketing organization. Reports can be viewed on-line or they can be emailed to you. Reports are sent as attachments so they can easily be forwarded to others. Selected reports are also available in comma delimited format for importing into other software.

Examples of the reports available are: Status Reports, Reps With Completed Courseware, Reps With Unsatisfied Requirements, Reps Who Have Never Logged In, and BD Hierarchy.

The main screen for a planner is a summary of their personal status in all required courses and electives. Status information includes whether or not the course has been started, whether it has been completed, whether the associated test has been passed, and the required completion date.

The planner can start or resume a course, resume a test or print a course module for offline study.

The Module Status screen may also include links to sites where a planner may apply for other professional CE credit, score reports, and a printable certificate of completion.



Planners are given immediate feedback on their performance to create a more effective learning environment. The system can be configured to give a planner feedback after every test question. Tests can be configured to allow retaking if not passed. Planners can stop and restart tests as needed making it possible to utilize small blocks of time.



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