

Fixed Income Academy: Strategic Partner Affiliate Program

Prepared for: The CMTA Board and Staff
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Company Vision & Mission

Investor Confidence: *Certified*. Deliver the foundational knowledge necessary for equip professionals with investment and investment oversight responsibilities to analyze financial strategies and instruments. Our goal is to teach our students to ask the right questions and connect them to the expert resources to get the right answers.

Program Objective

Partner with liked minded associations to build online learning communities and become extensions of our strategic partner associations. Encourage the culture of life-long learning among the clients we serve by providing education and training; along with the tools and access to experts required to define results, measure outcomes and complete tasks.

Program Goal

Enroll students in FIA's online and on-demand Bond School by forming partnerships with trade associations whose mission it is to educate.

Solution: 1+1=3

Phase 1) delivering knowledge via FIA's Bond School

Phase 2) *certifying* customized content targeted specifically for your organization

Phase 3) benefitting from a new channel for year-round member engagement.

Phase 1) Fulfilling the Mission to Educate – Now Available

Co-market the current CFIP Program with Fixed Income Academy to provide CMTA members access to courses at discounted rates.

Phase 2) Co-Created and Co-Branded Content – Expected Q3 2012

Co-create by combining core FIA curriculum with new courses most relevant to your members. FIA affiliates will have the opportunity to repurpose conference content and create unique certifications. For example, *Benchmarking Plus* to expand on presentations given at the annual CMTA conference.

- Affiliates will receive reduced rate for course production of customized courses
 - Co-Branded course price point will be based on production costs plus level of information and CPE credits provided.
 - Co-Branded content will benefit from FIA's NASBA approved sponsorship, making course credits eligible for CPE credits.

Phase 3) Life Long Learning – Expected Q4 2012

Access “Member Only” access to FIA weekly insights, market commentary and peer-to-peer interaction. Subscription product expected 4th quarter 2012.

- Discounted prices for FIA Bond School Students and Association Partner Members
- CMTA will benefit by connecting year-round with members, which will enhance the offline conference experience and increase association membership.
- CMTA will benefit from Fixed Income Academy's online marketing of FIA programs, emphasizing the need for continual investor education and the importance of connection with a trade association like CMTA.

Partner Association Benefits

- Advance CMTA's mission to educate by enrolling students in Bond School
- Offer members reduced rates for Bond School courses (See Below)
- Access ability to “CPE certify” co-branded and co-created CMTA content
- Access a new channel to build relationships and connect with members year round
- Access a new channel to market memberships and conferences year round
- Benefit from FIA's continual marketing efforts and promotion of investor education

Partner Association Responsibilities

- Provide access to membership for marketing purposes: Position FIA as partner
- Provide FIA sponsor benefits at conference to build relationships with members
- Provide FIA with access to conference speakers in order to curate new content
- Collaborate with FIA to create new content suitable for NASBA certified courses
- Actively promote FIA bond school and learning community
- Suitably market to members for purposes of marketing courses and subscriptions

Anticipated Affiliate Partner Pricing Model

FIA Product	Retail Price*	CMTA Member Price**
Complete Bond School	\$1650	\$1275
Customized Courses	TBD***	20% off retail
Monthly Subscription	\$69/month****	20% off retail

*Anticipated Retail Price at relaunch in March 2012 (with CPE certifications and enhanced Student Support Services)

**~20% discount offered to Affiliate Association members, encourages membership!

***Pricing will be based on number of factors as agreed upon by FIA and partner association. Percentages apply.

****Price subject to change as amount of monthly content, and cost to produce increases over time.