



CERTIFIED CAPITAL RAISING SPECIALIST

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STUDY GUIDE

Sponsored by:



Accredited Certification Institute (ACI)

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This study guide has been created for individuals who are studying for the Certified Capital Raising Specialist (CCRS) Certification Program. Please use this guide to assist in preparation for your examination.

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I. Accredited CERTIFICATION INSTITUTE:

Accredited Certification Institute is the leading online program for specialized niche finance certification programs. The team behind Accredited Certification Institute is comprised of industry experts in niches including online marketing, project management, public relations, consulting, and many more.

This experience, combined with our advisory board's expertise in online education and training, is what makes it possible to provide the training and certification programs found on our website.

Accredited Certification Institute is a global training and certification organization that has provided practical industry-specific certification to over 20,000 clients from the United States, Europe, and more than 75 other countries around the world.

We provide high value training programs that provide function knowledge on very specific business topics such as public relations, online marketing, project management, international business, and consulting.

Accredited Certification Mission: To provide professionals with high impact finance training and certifications in niche subject areas that are functional and immediately beneficial.

Accredited Certification Institute helps you to:

- ï Quickly gain specialized knowledge in highly valuable business niches.
- ï Enhance your credibility, resume, and overall value in the marketplace.
- ï Complete our training programs in 5 months from anywhere in the world.

Our programs accept participants year-round and are flexible to work with your current work schedule and academic constraints. You can complete one of our programs in 2 months or 2 years; the choice is yours.

MASTER'S CERTIFICATE PROGRAMS: Accredited Certification Institute is proud to offer several advanced Master's Certificates that require the completion of five programs from Accredited Certification Institute platform.

To learn more about these Master's Certificates and how to earn one, please see our website: <https://Certification.com/Masters>

II. CCRS DETAILS AND TIMELINE:

PROGRAM DETAILS:

Certified Capital Raising Specialist (CCRS) certification program is unique in that it is modeled after many online courses offered at Ivy League institutions today, offering more value for a more cost-effective program. The CCRS Program is a self-study program that includes educational multimedia resources in video form, a study guide, required readings, and a flexible online examination process, accessible around the world.

The online exam is structured so that in order to complete the exam within the 2-hour time frame one must read through all of the assigned materials and conceptually understand the majority of the material to score well enough to pass the exam.

Our goal is to offer the most challenging program in the industry while also providing all of the learning tools possible to ensure participants get the most out of the experience. By testing the knowledge depth

and comprehension from the materials digested, the CCRS certification prepares individuals for successful, real-world application.

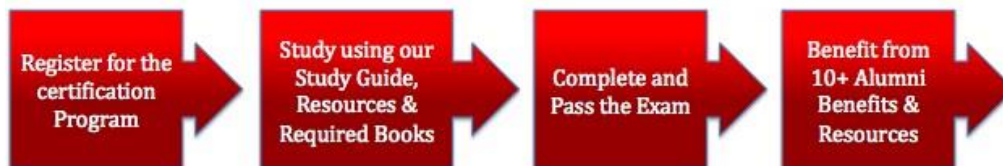
The Certified Capital Raising Specialist (CCRS) program is sponsored by the GTC Institute and offered by Accredited Certification Institute. This certification program is designed to show and certify that you have gained an in-depth understanding and high-level, specialized knowledge.

In addition to the benefits of gained knowledge, growing industry recognition, more knowledgeable career choices, and networking, our organization is also developing additional resources for CCRS Participants. This includes video and MP3 recordings on Q&A or strategies and tactics, webinars, access to interviews with internet marketing professionals who have more than 10 years of experience in the industry, among many more benefits.

The experts interviewed for this capital raising certification program have reached raised well over \$100M each and their audio interviews recorded from on stage at our sister company's Family Office Club conferences or via telephone audio interviews help provide a practical variety of perspectives to the CCRS program.

Certified Capital Raising Specialist (CCRS) Video Content: The video content for the CCRS program includes a full 6 hours capital raising bootcamp held by Richard C. Wilson who has raised over \$250M and grown a \$4B+ buy-side advisory business serving family offices. This in-depth capital raising workshop is supplemented by several 60 minute webinars, discussion panels from our various investor conferences hosted by the Family Office Club, and some short practical insights from Richard that are 3-7 minutes long each. This variety will help give you a detailed overview of the industry, hear directly from investors are part of the training, and help reinforce several points that will naturally come out in all of the video and audio resources.

4 STEP CERTIFICATION PROCESS



TIMELINE & EXAMINATION DATES:

Programs are offered through open enrollment, making our programs 100% flexible to accommodate your current work or academic schedule.

Accredited Certification Institute exams are administered 100% online.

III. REQUIRED READING:

- i Capital Raising: The 5-Step System for Raising Capital from Private Investors by Richard C. Wilson
ISBN-13: 978-1537526621

LEARNING OBJECTIVES OF THE CCRS:

- ï Gain a detailed perspective on what various types of investors expect and want when seeking investments, including the difference between HNW private investors, family offices, and institutional investors.
- ï Explore the topics of copywriting, investor avatars, re-marketing, social media, investor funnels, single family offices, master DDQs, and placements agents so you can more swiftly navigate various capital raising tools and methods.
- ï Become familiar with the 5-Step system for raising capital as an option to attract investors to the organization you represent vs. calling out or networking to identify and close new investors.
- ï Learn essential investment marketing and sales actions that must be taken to properly follow up with investors, many of which are specific to capital raising
- ï Familiarize yourself with the fundamentals of capital raising to shine a light on industry myths and common expensive mistakes that almost everyone makes while starting out.

IV. CCRS EXAMPREPARATION

1. **EXAM COMPOSITION:**

There are a total of 100 points available to earn for the exam, 80 of which can be earned from the multiple choice or true/false questions that are worth 1 point each. Please see below for the composition and distribution of the points in-depth.

<u>Topics and Weights</u>	
Capital Raising Fundamentals [13%]	10-15 Questions
Capital Raising Mistakes & Myths [13%]	10-15 Questions
Investment Marketing Materials [13%]	10-15 Questions
Effective Investor Communications [13%]	10-15 Questions
The 5-Step System Process [13%]	10-15 Questions
Investor Communication Strategies [13%]	10-15 Questions

You will have 2 hours to complete the exam. Those who have not made the effort to read the materials will have a hard time completing the exam within the allotted time, but for participants who have read the required reading, 2 hours will be sufficient. Your test results will be sent to you 2 weeks after your examination date.

2. **TERMS AND CONCEPTS TO KNOW:**

Below, please find the terms and concepts that you should be able to define after having read the required reading. Please define the terms from the required reading rather than a dictionary. You will be tested on the definitions that authors have provided.

- ï Investor Funnel
- ï Master DDQ
- ï Family Office
- ï Single Family Office
- ï Institutional Investors
- ï Accredited Investors
- ï Re-Marketing
- ï Copywriting
- ï Marketing Automation
- ï One-Pager
- ï PitchDeck
- ï One-Liner
- ï Multi-Modal Marketing
- ï Speed of Implementation
- ï Unique Ability

3. **SAMPLE QUESTIONS:** (Answers are provided on the last page of this study guide.)

1. *How often is it suggested you follow up with potential investors typically?*
 - a. 1-2x a day
 - b. It depends on the investor but typically every 2 days
 - c. Once every 10-15 days specific to the investors interest level
 - d. This doesn't impact your success is not relevant to raising capital
2. *What type of copywriting was discussed in the CCRS program?*
 - a. Legal protection of your marketing materials while preparing to raise capital
 - b. The optimization of written materials to catch the attention and influence investors more effectively
 - c. The practice of analyzing your competition to copy their best practices and make them your own within your own capital raising efforts.
 - d. None of the above
3. *What is the final of the 5 steps of raising capital according to Richard C. Wilson?*
 - a. Execute
 - b. Iterate
 - c. Analyze
 - d. Architect

4. *What is a Master DDQ?*
- a. A standardized due diligence questionnaire that is detailed and prepared ahead of time so it can be customized and used to respond to institutional investor requests for detailed questionnaire responses.
 - b. A due diligence questionnaire available for purchase so that you can model your answers to common investor questions off of a professional capital raisers responses.
 - c. The blank template that most private investors will ask you to complete before they consider your investment offering.
 - d. The questionnaire given out by regulators to complete before you are legally allowed to be raising capital.
5. *How long should an ideal pitch deck be?*
- a. 10-20 pages
 - b. 1-2 pages
 - c. 2-12 pages
 - d. 40-50 pages

SAMPLE QUESTION ANSWERS:

1. c) 3. c) 5. a)
2. b) 4. a)

FAQ(FREQUENTLY ASKED QUESTIONS):

Have more questions or need more information?

Please see our consistently updated FAQ (Frequently Asked Questions) section on Accredited Certification Institute website here at <https://Certification.com/FAQ>

You can also get in touch with Accredited Certification Institute team via email at Support@Certification.com by phone, and through our Click and Chat tool, accessible from our homepage: <https://Certification.com>

Thanks for joining Accredited Certification Institute Team. Please let us know if you have any questions.



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