

Executive Certificate in Financial Planning

Program Duration: 9 months



Executive Certificate in Financial Planning Program Schedule January 2021 – September 2021

Fundamentals of Planning and Insurance (40 Hours)

January 21, 5:30 p.m. – 9:45 p.m.
January 28, 5:30 p.m. – 9:45 p.m.
January 30, 9:00 a.m. – 5:00 p.m.
February 4, 5:30 p.m. – 9:45 p.m.
February 11, 5:30 p.m. – 9:45 p.m.
February 18, 5:30 p.m. – 9:45 p.m.
February 20, 9:00 a.m. – 5:00 p.m.
February 25, 5:30 p.m. – 9:45 p.m.

Investment Planning (32 Hours)

March 4, 5:30 p.m. – 9:45 p.m.
March 11, 5:30 p.m. – 9:45 p.m.
March 13, 9:00 a.m. – 5:00 p.m.
March 18, 5:30 p.m. – 9:45 p.m.
March 25, 5:30 p.m. – 9:45 p.m.
March 27, 9:00 a.m. – 5:00 p.m.

Income Tax Planning (32 Hours)

April 3, 9:00 a.m. – 5:00 p.m.
April 8, 5:30 p.m. – 9:45 p.m.
April 15, 5:30 p.m. – 9:45 p.m.
April 17, 9:00 a.m. – 5:00 p.m.
April 22, 5:30 p.m. – 9:45 p.m.
April 29, 5:30 p.m. – 9:45 p.m.

Retirement Planning and Employee Benefits (32 Hours)

May 13, 5:30 p.m. – 9:45 p.m.
May 20, 5:30 p.m. – 9:45 p.m.
May 27, 5:30 p.m. – 9:45 p.m.
May 29, 9:00 a.m. – 5:00 p.m.
June 3, 5:30 p.m. – 9:45 p.m.
June 12, 9:00 a.m. – 5:00 p.m.

Estate Planning (32 Hours)

June 17, 5:30 p.m. – 9:45 p.m.
July 1, 5:30 p.m. – 9:45 p.m.
July 8, 5:30 p.m. – 9:45 p.m.
July 10, 9:00 a.m. – 5:00 p.m.
July 15, 5:30 p.m. – 9:45 p.m.
July 24, 9:00 a.m. – 5:00 p.m.

Capstone Course (32 Hours)

August 5, 5:30 p.m. – 9:45 p.m.
August 26, 5:30 p.m. – 9:45 p.m.
August 28, 9:00 a.m. – 5:00 p.m.
September 2, 5:30 p.m. – 9:45 p.m.
September 11, 9:00 a.m. – 5:00 p.m.
September 16, 5:30 p.m. – 9:45 p.m.

Class Schedule is subject to change