

EXECUTIVE CERTIFICATE IN FINANCIAL PLANNING

Executive Certificate in Financial Planning Program Schedule* September 2022 – May 2023:

Fundamentals of Planning and Insurance (40 Hours)

September 19, 5:30 p.m. – 9:45 p.m.

September 26, 5:30 p.m. – 9:45 p.m.

October 3, 5:30 p.m. – 9:45 p.m.

October 8, 9:00 a.m. – 5:00 p.m. ***

October 10, 5:30 p.m. – 9:45 p.m.

October 24, 5:30 p.m. – 9:45 p.m.

October 29, 9:00 a.m. – 5:00 p.m. ***

November 7, 5:30 p.m. – 9:45 p.m.

Investment Planning (32 Hours)

November 14, 5:30 p.m. – 9:45 p.m.

November 19, 9:00 a.m. – 5:00 p.m. ***

November 28, 5:30 p.m. – 9:45 p.m.

December 5, 5:30 p.m. – 9:45 p.m.

December 10, 9:00 a.m. – 5:00 p.m. ***

December 12, 5:30 p.m. – 9:45 p.m.

Income Tax Planning (32 Hours)

January 9, 5:30 p.m. – 9:45 p.m.

January 14, 9:00 a.m. – 5:00 p.m. ***

January 23, 5:30 p.m. – 9:45 p.m.

January 30, 5:30 p.m. – 9:45 p.m.

February 4, 9:00 a.m. – 5:00 p.m. ***

February 6, 5:30 p.m. – 9:45 p.m.

Retirement Planning and Employee Benefits (32 Hours)

February 13, 5:30 p.m. – 9:45 p.m.

February 18, 9:00 a.m. – 5:00 p.m. ***

February 20, 5:30 p.m. – 9:45 p.m.

February 27, 5:30 p.m. – 9:45 p.m.

March 4, 9:00 a.m. – 5:00 p.m. ***

March 6, 5:30 p.m. – 9:45 p.m.

Estate Planning (32 Hours)

March 13, 5:30 p.m. – 9:45 p.m.

March 20, 5:30 p.m. – 9:45 p.m.

March 25, 9:00 a.m. – 5:00 p.m. ***

March 27, 5:30 p.m. – 9:45 p.m.

April 3, 5:30 p.m. – 9:45 p.m.

April 15, 9:00 a.m. – 5:00 p.m. ***

Capstone Course (32 Hours)**

April 24, 5:30 p.m. – 9:45 p.m.

April 29, 9:00 a.m. – 5:00 p.m. ***

May 1, 5:30 p.m. – 9:45 p.m.

May 8, 5:30 p.m. – 9:45 p.m.

May 15, 5:30 p.m. – 9:45 p.m.

May 20, 9:00 a.m. – 5:00 p.m. ***

**Class Schedule is subject to change.*

***Please note that the Capstone Course is a total of 45 hours, which constitutes the hours of in-class time plus hours for case projects including outside meetings with instructor and student teams.*

****Dates in bold denote full day sessions.*