

EXECUTIVE CERTIFICATE IN FINANCIAL PLANNING

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

Fundamentals of Planning and Insurance (40 Hours)

January 19, 5:30 p.m. – 9:45 p.m.
January 21, 9:00 a.m. – 5:00 p.m. ***
January 26, 5:30 p.m. – 9:45 p.m.
February 2, 5:30 p.m. – 9:45 p.m.
February 9, 5:30 p.m. – 9:45 p.m.
February 11, 9:00 a.m. – 5:00 p.m. ***
February 16, 5:30 p.m. – 9:45 p.m.
February 23, 5:30 p.m. – 9:45 p.m.

Investment Planning (32 Hours)

March 2, 5:30 p.m. – 9:45 p.m.
March 9, 5:30 p.m. – 9:45 p.m.
March 11, 9:00 a.m. – 5:00 p.m. ***
March 16, 5:30 p.m. – 9:45 p.m.
March 23, 5:30 p.m. – 9:45 p.m.
March 30, 5:30 p.m. – 9:45 p.m.
April 6, 5:30 p.m. – 9:45 p.m.

Income Tax Planning (32 Hours)

April 13, 5:30 p.m. – 9:45 p.m.
April 20, 5:30 p.m. – 9:45 p.m.
April 27, 5:30 p.m. – 9:45 p.m.
May 6, 9:00 a.m. – 5:00 p.m. ***
May 11, 5:30 p.m. – 9:45 p.m.
May 18, 5:30 p.m. – 9:45 p.m.
May 25, 5:30 p.m. – 9:45 p.m.

Retirement Planning and Employee Benefits (32 Hours)

June 1, 5:30 p.m. – 9:45 p.m.
June 8, 5:30 p.m. – 9:45 p.m.
June 10, 9:00 a.m. – 5:00 p.m. ***
June 15, 5:30 p.m. – 9:45 p.m.
June 22, 5:30 p.m. – 9:45 p.m.
June 24, 9:00 a.m. – 5:00 p.m. ***

Estate Planning (32 Hours)

June 29, 5:30 p.m. – 9:45 p.m.
July 6, 5:30 p.m. – 9:45 p.m.
July 8, 9:00 a.m. – 5:00 p.m. ***
July 13, 5:30 p.m. – 9:45 p.m.
July 20, 5:30 p.m. – 9:45 p.m.
July 29, 9:00 a.m. – 5:00 p.m. ***

Capstone Course (32 Hours)**

August 3, 5:30 p.m. – 9:45 p.m.
August 12, 9:00 a.m. – 5:00 p.m. ***
August 24, 5:30 p.m. – 9:45 p.m.
August 31, 5:30 p.m. – 9:45 p.m.
September 7, 5:30 p.m. – 9:45 p.m.
September 9, 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.*