

**Xavier University**  
**Executive Certificate in Financial Planning Program Schedule**  
**September 2020 - May 2021**

**General Financial Planning Principles, Professional Conduct, and Regulation/Risk Management, Insurance, and Employee Benefits (40 Hours)**

September 28, 5:30 PM - 9:45 PM	4
October 5, 5:30 PM - 9:45 PM	4
October 13, 5:30 PM - 9:45 PM	4
October 19, 5:30 PM - 9:45 PM	4
<b>October 24, 9:00 AM - 5:00 PM</b>	<b>8</b>
October 26, 5:30 PM - 9:45 PM	4
November 2, 5:30 PM - 9:45 PM	4
<b>November 7, 9:00 AM - 5:00 PM</b>	<b>8</b>

**Investment Planning (32 Hours)**

November 9, 5:30 PM - 9:45 PM	4
November 16, 5:30 PM - 9:45 PM	4
<b>November 21, 9:00 AM - 5:00 PM</b>	<b>8</b>
November 23, 5:30 PM - 9:45 PM	4
November 30, 5:30 PM - 9:45 PM	4
<b>December 5, 9:00 AM - 5:00 PM</b>	<b>8</b>

**Retirement Savings and Income (32 Hours)**

<b>January 9, 9:00 AM - 5:00 PM</b>	<b>8</b>
January 11, 5:30 PM - 9:45 PM	4
<b>January 23, 9:00 AM - 5:00 PM</b>	<b>8</b>
January 25, 5:30 PM - 9:45 PM	4
February 1, 5:30 PM - 9:45 PM	4
February 8, 5:30 PM - 9:45 PM	4

**Tax Planning (32 Hours)**

February 15, 5:30 PM - 9:45 PM	4
<b>February 27, 9:00 AM - 5:00 PM</b>	<b>8</b>
March 1, 5:30 PM - 9:45 PM	4
March 8, 5:30 PM - 9:45 PM	4
March 15, 5:30 PM - 9:45 PM	4
<b>March 20, 9:00 AM - 5:00 PM</b>	<b>8</b>

**Estate Planning (32 Hours)**

March 22, 5:30 PM - 9:45 PM	4
March 30, 5:30 PM - 9:45 PM	4
<b>April 10, 9:00 AM - 5:00 PM</b>	<b>8</b>
April 12, 5:30 PM - 9:45 PM	4
April 19, 5:30 PM - 9:45 PM	4
<b>April 24, 9:00 AM - 5:00 PM</b>	<b>8</b>

**Capstone Case Course in Financial Planning (32 Hours)**

April 26, 5:30 PM - 9:45 PM	4
<b>May 1, 9:00 AM - 5:00 PM</b>	<b>8</b>
May 3, 5:30 PM - 9:45 PM	4
May 10, 5:30 PM - 9:45 PM	4
May 17, 9:00 AM - 5:00 PM	4
<b>May 22, 9:00 AM - 5:00 PM</b>	<b>8</b>

\*\*Please note that the Capstone Case Class 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.

\*\*Class Schedule is subject to change\*\*