

EXECUTIVE CERTIFICATE IN FINANCIAL PLANNING

Executive Certificate in Financial Planning Program Schedule* September 2023 – May 2024:

Fundamentals of Planning and Insurance (40 Hours)

September 18, 5:30 p.m. – 9:45 p.m.
September 30, 9:00 a.m. – 5:00 p.m. ***
October 2, 5:30 p.m. – 9:45 p.m.
October 9, 5:30 p.m. – 9:45 p.m.
October 14, 9:00 a.m. – 5:00 p.m. ***
October 23, 5:30 p.m. – 9:45 p.m.
October 28, 9:00 a.m. – 5:00 p.m. ***

Investment Planning (32 Hours)

November 6, 5:30 p.m. – 9:45 p.m.
November 11, 9:00 a.m. – 5:00 p.m. ***
November 13, 5:30 p.m. – 9:45 p.m.
December 4, 5:30 p.m. – 9:45 p.m.
December 9, 9:00 a.m. – 5:00 p.m. ***
December 11, 5:30 p.m. – 9:45 p.m.

Income Tax Planning (32 Hours)

January 8, 5:30 p.m. – 9:45 p.m.
January 13, 9:00 a.m. – 5:00 p.m. ***
January 22, 5:30 p.m. – 9:45 p.m.
January 29, 5:30 p.m. – 9:45 p.m.
February 3, 9:00 a.m. – 5:00 p.m. ***
February 5, 5:30 p.m. – 9:45 p.m.

Retirement Planning and Employee Benefits (32 Hours)

February 12, 5:30 p.m. – 9:45 p.m.
February 17, 9:00 a.m. – 5:00 p.m. ***
February 19, 5:30 p.m. – 9:45 p.m.
February 26, 5:30 p.m. – 9:45 p.m.
March 2, 9:00 a.m. – 5:00 p.m. ***
March 4, 5:30 p.m. – 9:45 p.m.

Estate Planning (32 Hours)

March 18, 5:30 p.m. – 9:45 p.m.
March 23, 9:00 a.m. – 5:00 p.m. ***
March 25, 5:30 p.m. – 9:45 p.m.
April 8, 5:30 p.m. – 9:45 p.m.
April 13, 9:00 a.m. – 5:00 p.m. ***
April 15, 5:30 p.m. – 9:45 p.m.

Capstone Course (32 Hours)**

April 22, 5:30 p.m. – 9:45 p.m.
April 27, 9:00 a.m. – 5:00 p.m. ***
May 6, 5:30 p.m. – 9:45 p.m.
May 11, 9:00 a.m. – 5:00 p.m. ***
May 13, 5:30 p.m. – 9:45 p.m.
May 20, 5:30 p.m. – 9:45 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.*