

EXECUTIVE CERTIFICATE IN FINANCIAL PLANNING

Executive Certificate in Financial Planning Program Schedule* March – December 2024:

Fundamentals of Planning and Insurance (40 Hours)

March 14, 5:30 p.m. – 9:45 p.m.
March 21, 5:30 p.m. – 9:45 p.m.
April 11, 5:30 p.m. – 9:45 p.m.
April 20, 9:00 a.m. – 5:00 p.m. ***
April 25, 5:30 p.m. – 9:45 p.m.
May 2, 5:30 p.m. – 9:45 p.m.
May 4, 9:00 a.m. – 5:00 p.m. ***
May 9, 5:30 p.m. – 9:45 p.m.

Investment Planning (32 Hours)

May 18, 9:00 a.m. – 5:00 p.m. ***
May 23, 5:30 p.m. – 9:45 p.m.
May 30, 5:30 p.m. – 9:45 p.m.
June 6, 5:30 p.m. – 9:45 p.m.
June 13, 5:30 p.m. – 9:45 p.m.
June 22, 9:00 a.m. – 5:00 p.m. ***

Income Tax Planning (32 Hours)

July 25, 5:30 p.m. – 9:45 p.m.
August 1, 5:30 p.m. – 9:45 p.m.
August 3, 9:00 a.m. – 5:00 p.m. ***
August 8, 5:30 p.m. – 9:45 p.m.
August 22, 5:30 p.m. – 9:45 p.m.
August 24, 9:00 a.m. – 5:00 p.m. ***

Retirement Planning and Employee Benefits (32 Hours)

August 29, 5:30 p.m. – 9:45 p.m.
September 5, 5:30 p.m. – 9:45 p.m.
September 7, 9:00 a.m. – 5:00 p.m. ***
September 12, 5:30 p.m. – 9:45 p.m.
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.

Estate Planning (32 Hours)

October 10, 5:30 p.m. – 9:45 p.m.
October 17, 5:30 p.m. – 9:45 p.m.
October 19, 9:00 a.m. – 5:00 p.m. ***
October 24, 5:30 p.m. – 9:45 p.m.
November 2, 9:00 a.m. – 5:00 p.m. ***
November 7, 5:30 p.m. – 9:45 p.m.

Capstone Course (32 Hours)**

November 9, 9:00 a.m. – 5:00 p.m. ***
November 14, 5:30 p.m. – 9:45 p.m.
November 21, 5:30 p.m. – 9:45 p.m.
December 5, 5:30 p.m. – 9:45 p.m.
December 7, 9:00 a.m. – 5:00 p.m. ***
December 12, 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.*