

# EXECUTIVE CERTIFICATE IN FINANCIAL PLANNING



Executive Certificate in Financial Planning Program Schedule\*  
September 2024 – May 2025:

## Fundamentals of Planning and Insurance (40 Hours)

September 9, 5:30 p.m. – 9:45 p.m.

September 16, 5:30 p.m. – 9:45 p.m.

**September 21, 9:00 a.m. – 5:00 p.m. \*\*\***

**September 28, 9:00 a.m. – 5:00 p.m. \*\*\***

September 30, 5:30 p.m. – 9:45 p.m.

October 7, 5:30 p.m. – 9:45 p.m.

October 14, 5:30 p.m. – 9:45 p.m.

October 21, 5:30 p.m. – 9:45 p.m.

## Investment Planning (32 Hours)

October 28, 5:30 p.m. – 9:45 p.m.

November 11, 5:30 p.m. – 9:45 p.m.

November 18, 5:30 p.m. – 9:45 p.m.

December 2, 5:30 p.m. – 9:45 p.m.

December 9, 5:30 p.m. – 9:45 p.m.

**December 14, 9:00 a.m. – 5:00 p.m. \*\*\***

December 16, 5:30 p.m. – 9:45 p.m.

## Income Tax Planning (32 Hours)

January 6, 5:30 p.m. – 9:45 p.m.

January 13, 5:30 p.m. – 9:45 p.m.

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

January 27, 5:30 p.m. – 9:45 p.m.

**February 1, 9:00 a.m. – 5:00 p.m. \*\*\***

February 3, 5:30 p.m. – 9:45 p.m.

## Retirement Planning and Employee Benefits (32 Hours)

February 10, 5:30 p.m. – 9:45 p.m.

**February 15, 9:00 a.m. – 5:00 p.m. \*\*\***

February 17, 5:30 p.m. – 9:45 p.m.

February 24, 5:30 p.m. – 9:45 p.m.

**March 1, 9:00 a.m. – 5:00 p.m. \*\*\***

March 10, 5:30 p.m. – 9:45 p.m.

## Estate Planning (32 Hours)

**March 22, 9:00 a.m. – 5:00 p.m. \*\*\***

March 24, 5:30 p.m. – 9:45 p.m.

March 31, 5:30 p.m. – 9:45 p.m.

**April 5, 9:00 a.m. – 5:00 p.m. \*\*\***

April 7, 5:30 p.m. – 9:45 p.m.

April 14, 5:30 p.m. – 9:45 p.m.

## Capstone Course (32 Hours)\*\*

April 21, 5:30 p.m. – 9:45 p.m.

**April 26, 9:00 a.m. – 5:00 p.m. \*\*\***

May 5, 5:30 p.m. – 9:45 p.m.

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

May 12, 5:30 p.m. – 9:45 p.m.

May 19, 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.*