

EXECUTIVE CERTIFICATE IN FINANCIAL PLANNING



Executive Certificate in Financial Planning Program Schedule* September 2025 – May 2026:

Fundamentals of Planning and Insurance (40 Hours)

September 8, 5:30 p.m. – 9:45 p.m. .

September 13, 9:00 a.m. – 5:00 p.m. ***

September 15, 5:30 p.m. – 9:45 p.m.

September 27, 9:00 a.m. – 5:00 p.m. ***

September 29, 5:30 p.m. – 9:45 p.m.

October 6, 5:30 p.m. – 9:45 p.m.

October 13, 5:30 p.m. – 9:45 p.m.

October 20, 5:30 p.m. – 9:45 p.m.

Investment Planning (32 Hours)

October 27, 5:30 p.m. – 9:45 p.m.

November 10, 5:30 p.m. – 9:45 p.m.

November 17, 5:30 p.m. – 9:45 p.m.

December 1, 5:30 p.m. – 9:45 p.m.

December 8, 5:30 p.m. – 9:45 p.m.

December 13, 9:00 a.m. – 5:00 p.m. ***

December 15, 5:30 p.m. – 9:45 p.m.

Income Tax Planning (32 Hours)

January 5, 5:30 p.m. – 9:45 p.m.

January 10, 9:00 a.m. – 5:00 p.m. ***

January 12, 5:30 p.m. – 9:45 p.m.

January 24, 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.

Retirement Planning and Employee Benefits (32 Hours)

February 9, 5:30 p.m. – 9:45 p.m.

February 14, 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.

March 2, 5:30 p.m. – 9:45 p.m.

March 7, 9:00 a.m. – 5:00 p.m. ***

Estate Planning (32 Hours)

March 16, 5:30 p.m. – 9:45 p.m.

March 23, 5:30 p.m. – 9:45 p.m.

March 28, 9:00 a.m. – 5:00 p.m. ***

March 30, 5:30 p.m. – 9:45 p.m.

April 11, 9:00 a.m. – 5:00 p.m. ***

April 13, 5:30 p.m. – 9:45 p.m.

Capstone Course (32 Hours)**

April 20, 5:30 p.m. – 9:45 p.m.

April 25, 9:00 a.m. – 5:00 p.m. ***

May 4, 5:30 p.m. – 9:45 p.m.

May 9, 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.

**Class Schedule is subject to change.*

***Please note the Capstone course requires students to complete a self-paced, individual case project. Formal class sessions may not meet in person and instead serve as designated office hours with the instructor.*

****Dates in bold denote full day sessions.*

