BELLARMINE UNIVERSITY

Executive Certificate in Financial Planning Program
September 2012 – June 2013

Fundamentals of Financial Planning and Insurance (48 Hours)

September 7, 5:00 p.m. – 8:35 p.m.	4
September 8, 8:00 a.m. – 4:20 p.m.	8
September 21, 5:00 p.m. – 8:35 p.m.	4
September 22, 8:00 a.m. – 4:20 p.m.	8
October 5, 5:00 p.m. – 8:35 p.m.	4
October 6, 8:00 a.m. – 4:20 p.m.	8
October 19, 5:00 p.m. – 8:35 p.m.	4
October 20, 8:00 a.m. – 4:20 p.m.	8

Investments (36 Hours)

November 2, 5:00 p.m. – 8:35 p.m.	4
November 3, 8:00 a.m. – 4:20 p.m.	8
November 16, 5:00 p.m. – 8:35 p.m.	4
November 17, 8:00 a.m. – 4:20 p.m.	8
November 30, 5:00 p.m. – 8:35 p.m.	4
December 1, 8:00 a.m. – 4:20 p.m.	8

Taxation of Persons, Property and Other Entities (36 Hours)

January 4, 5:00 p.m. – 8:35 p.m.	4
January 5, 8:00 a.m. – 4:20 p.m.	8
January 18, 5:00 p.m. – 8:35 p.m.	4
January 19, 8:00 a.m. – 4:20 p.m.	8
February 1, 5:00 p.m. – 8:35 p.m.	4
February 2, 8:00 a.m. – 4:20 p.m.	8

Retirement and Employee Benefits (36 Hours)

February 15, 5:00 p.m. – 8:35 p.m.	4
February 16, 8:00 a.m. – 4:20 p.m.	8
March 1, 5:00 p.m. – 8:35 p.m.	4
March 2, 8:00 a.m. – 4:20 p.m.	8
March 15, 5:00 p.m. – 8:35 p.m.	4
March 16, 8:00 a.m. – 4:20 p.m.	8

Estate Tax Planning (36 Hours)

April 5, 5:00 p.m. – 8:35 p.m.	4
April 6, 8:00 a.m. – 4:20 p.m.	8
April 12, 5:00 p.m. – 8:35 p.m. *	4
April 13, 8:00 a.m. – 4:20 p.m. *	8
April 26, 5:00 p.m. – 8:35 p.m.	4
April 27, 8:00 a.m. – 4:20 p.m.	8

Capstone Case Course in Financial Planning (36 Hours)**

May 10, 5:00 p.m. – 8:35 p.m.	4
May 11, 8:00 a.m. – 4:20 p.m.	8
May 24, 5:00 p.m. – 8:35 p.m.	4
May 25, 8:00 a.m. – 4:20 p.m.	8
May 31 5:00 p.m. – 8:35 p.m. *	4
June 1, 8:00 a.m. – 4:20 p.m. *	8

* Denotes back-to-back weekends

Please note that the Capstone Case Class is a total of 45 hours, which constitutes 36 hours of in class time plus 9 hours for case projects including outside meetings with instructor and student teams.