

Bellarmine University
Executive Certificate in Financial Planning Program
 September 2021 - May 2022

511 - General Financial Planning Principles, Professional Conduct, and Regulation;
512 - Risk Management, Insurance, and Employee Benefits (48 Hours)

September 10, 5:00 PM - 8:35 PM	4
September 11, 8:00 AM - 4:20 PM	8
September 24, 5:00 PM - 8:35 PM	4
September 25, 8:00 AM - 4:20 PM	8
October 8, 5:00 PM - 8:35 PM	4
October 9, 8:00 AM - 4:20 PM	8
October 22, 5:00 PM - 8:35 PM	4
October 23, 8:00 AM - 4:20 PM	

513 - Investment Planning (36 Hours)

November 5, 5:00 PM - 8:35 PM	4
November 6, 8:00 AM - 4:20 PM	8
November 19, 5:00 PM - 8:35 PM	4
November 20, 8:00 AM - 4:20 PM	8
December 3, 5:00 PM - 8:35 PM	4
December 4, 8:00 AM - 4:20 PM	8

515 - Retirement Savings and Income (36 Hours)

December 17, 5:00 PM - 8:35 PM	4
December 18, 8:00 AM - 4:20 PM	8
January 7, 5:00 PM - 8:35 PM	4
January 8, 8:00 AM - 4:20 PM	8
January 21, 5:00 PM - 8:35 PM	4
January 22, 8:00 AM - 4:20 PM	8

514 - Tax Planning (36 Hours)

February 4, 5:00 PM - 8:35 PM	4
February 5, 8:00 AM - 4:20 PM	8
February 18, 5:00 PM - 8:35 PM	4
February 19, 8:00 AM - 4:20 PM	8
March 4, 5:00 PM - 8:35 PM	4
March 5, 8:00 AM - 4:20 PM	8

516 - Estate Planning (36 Hours)

March 18, 5:00 PM - 8:35 PM	4
March 19, 8:00 AM - 4:20 PM	8
April 1, 5:00 PM - 8:35 PM	4
April 2, 8:00 AM - 4:20 PM	8
April 8, 5:00 PM - 8:35 PM	4
April 9, 8:00 AM - 4:20 PM	8

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

April 22, 5:00 PM - 8:35 PM	4
April 23, 8:00 AM - 4:20 PM	8
May 13, 5:00 PM - 8:35 PM	4
May 14, 8:00 AM - 4:20 PM	8
May 20, 5:00 PM - 8:35 PM	4
May 21, 8:00 AM - 4:20 PM	8

** 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.