

**Bellarmine University**  
**Executive Certificate in Financial Planning Program**  
September 2022 - May 2023

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

September 9, 5:00 PM - 8:35 PM

September 10, 8:00 AM - 4:20 PM

September 23, 4:30 PM - 9:05 PM

\*Note time change for this weekend

September 24, 8:00 AM - 3:20 PM

October 7, 5:00 PM - 8:35 PM

October 8, 8:00 AM - 4:20 PM

October 21, 5:00 PM - 8:35 PM

October 22, 8:00 AM - 4:20 PM

**513 - Investment Planning (36 Hours)**

November 4, 5:00 PM - 8:35 PM

November 5, 8:00 AM - 4:20 PM

November 18, 5:00 PM - 8:35 PM

November 19, 8:00 AM - 4:20 PM

December 2, 5:00 PM - 8:35 PM

December 3, 8:00 AM - 4:20 PM

**515 - Retirement Savings and Income (36 Hours)**

December 16, 5:00 PM - 8:35 PM

December 17, 8:00 AM - 4:20 PM

January 6, 5:00 PM - 8:35 PM

January 7, 8:00 AM - 4:20 PM

January 20, 5:00 PM - 8:35 PM

January 21, 8:00 AM - 4:20 PM

**514 - Tax Planning (36 Hours)**

February 3, 5:00 PM - 8:35 PM

February 4, 8:00 AM - 4:20 PM

February 17, 5:00 PM - 8:35 PM

February 18, 8:00 AM - 4:20 PM

\*February 24, 5:00 PM - 8:35 PM

February 25, 8:00 AM - 4:20 PM

**516 - Estate Planning (36 Hours)**

March 10, 5:00 PM - 8:35 PM

March 11, 8:00 AM - 4:20 PM

March 24, 5:00 PM - 8:35 PM

March 25, 8:00 AM - 4:20 PM

\*March 31, 5:00 PM - 8:35 PM

April 1, 8:00 AM - 4:20 PM

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

April 14, 5:00 PM - 8:35 PM

April 15, 8:00 AM - 4:20 PM

April 28, 5:00 PM - 8:35 PM

April 29, 8:00 AM - 4:20 PM

May 12, 5:00 PM - 8:35 PM

May 13, 8:00 AM - 4:20 PM

\*Denotes back-to-back weekends due to date conflicts

\*\* 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.