

Bellarmino University
Executive Certificate in Financial Planning Program
September 2023 - May 2024

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

September 8, 5:00 PM - 8:35 PM
September 9, 8:00 AM - 4:20 PM
September 22, 5:00 PM - 8:35 PM
September 23, 8:00 AM - 4:20 PM
October 6, 5:00 PM - 8:35 PM
October 7, 8:00 AM - 4:20 PM
October 20, 5:00 PM - 8:35 PM
October 21, 8:00 AM - 4:20 PM

513 - Investment Planning (36 Hours)

November 3, 5:00 PM - 8:35 PM
November 4, 8:00 AM - 4:20 PM
November 17, 5:00 PM - 8:35 PM
November 18, 8:00 AM - 4:20 PM
December 1, 5:00 PM - 8:35 PM
December 2, 8:00 AM - 4:20 PM

515 - Retirement Savings and Income (36 Hours)

December 15, 5:00 PM - 8:35 PM
December 16, 8:00 AM - 4:20 PM
January 5, 5:00 PM - 8:35 PM
January 6, 8:00 AM - 4:20 PM
January 19, 5:00 PM - 8:35 PM
January 20, 8:00 AM - 4:20 PM

514 - Tax Planning (36 Hours)

February 2, 5:00 PM - 8:35 PM
February 3, 8:00 AM - 4:20 PM
February 16, 5:00 PM - 8:35 PM
February 17, 8:00 AM - 4:20 PM
March 1, 5:00 PM - 8:35 PM
March 2, 8:00 AM - 4:20 PM

516 - Estate Planning (36 Hours)

March 15, 5:00 PM - 8:35 PM
March 16, 8:00 AM - 4:20 PM
March 29, 5:00 PM - 8:35 PM
March 30, 8:00 AM - 4:20 PM
April 12, 5:00 PM - 8:35 PM
April 13, 8:00 AM - 4:20 PM

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

April 26, 5:00 PM - 8:35 PM
April 27, 8:00 AM - 4:20 PM
May 10, 5:00 PM - 8:35 PM
May 11, 8:00 AM - 4:20 PM
May 24, 5:00 PM - 8:35 PM
May 25, 8:00 AM - 4:20 PM

** 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.