

Bellarmine University
Executive Certificate in Financial Planning Program
September 2025 - May 2026
**Denotes back-to-back weekends*

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

Friday, August 22, 5:00 PM - 8:35 PM

Saturday, August 23, 8:00 AM - 4:20 PM

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

Saturday, September 6, 8:00 AM - 4:20 PM

511 Assessments, quizzes, case study, and final exam due date ----> 9/13/2025

Friday, September 19, 5:00 PM - 8:35 PM

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

Friday, October 3, 5:00 PM - 8:35 PM

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

512 Assessments, quizzes, case study, and final exam due date ----> 10/11/2025

513 - Investment Planning (36 Hours)

Friday, October 17, 5:00 PM - 8:35 PM

Saturday, October 18, 8:00 AM - 4:20 PM

*Friday, October 31, 5:00 PM - 8:35 PM - most likely no class this night

*Saturday, November 1, 8:00 AM - 4:20 PM

*Friday, November 7, 5:00 PM - 8:35 PM

*Saturday, November 8, 8:00 AM - 4:20 PM

513 Assessments, quizzes, case study, and final exam due date ----> 11/15/2025

515 - Retirement Savings and Income (36 Hours)

Friday, November 21, 5:00 PM - 8:35 PM

Saturday, November 22, 8:00 AM - 4:20 PM

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

Saturday, December 6, 8:00 AM - 4:20 PM

Friday, December 12, 5:00 PM - 8:35 PM

Saturday, December 13, 8:00 AM - 4:20 PM

515 Assessments, quizzes, case study, and final exam due date ----> 12/20/2025

514 - Tax Planning (36 Hours)

Friday, January 9, 5:00 PM - 8:35 PM

Saturday, January 10, 8:00 AM - 4:20 PM

Friday, January 23, 5:00 PM - 8:35 PM

Saturday, January 24, 8:00 AM - 4:20 PM

Friday, February 6, 5:00 PM - 8:35 PM

Saturday, February 7, 8:00 AM - 4:20 PM

514 Assessments, quizzes, case study, and final exam due date ----> 2/14/2026

516 - Estate Planning (36 Hours)

Friday, February 20, 5:00 PM - 8:35 PM

Saturday, February 21, 8:00 AM - 4:20 PM

Friday, March 6, 5:00 PM - 8:35 PM

Saturday, March 7, 8:00 AM - 4:20 PM

Friday, March 20, 5:00 PM - 8:35 PM

Saturday, March 21, 8:00 AM - 4:20 PM

516 Assessments, quizzes, case study, and final exam due date ----> 3/28/2026

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

*Friday, April 10, 5:00 PM - 8:35 PM

*Saturday, April 11, 8:00 AM - 4:20 PM

*Friday, April 17, 5:00 PM - 8:35 PM

*Saturday, April 18, 8:00 AM - 4:20 PM

*Friday, April 24, 5:00 PM - 8:35 PM

*Saturday, April 25, 8:00 AM - 4:20 PM

517 Assessments, quizzes, case study, and final exam due date ----> TBD

** 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.