

BELLARMINE UNIVERSITY

Executive Certificate in Financial Planning Program September 2016 - May 2017

Fundamentals and Ethical Considerations & Insurance and Employee Benefits (48 Hours)

September 16, 5:00 p.m. - 8:35 p.m.	4
September 17, 8:00 a.m. - 4:20 p.m.	8
September 30, 5:00 p.m. - 8:35 p.m.	4
October 1, 8:00 a.m. - 4:20 p.m.	8
October 14, 5:00 p.m. - 8:35 p.m.	4
October 15, 8:00 a.m. - 4:20 p.m.	8
October 28, 5:00 p.m. - 8:35 p.m.	4
October 29, 8:00 a.m. - 4:20 p.m.	8

Investment Planning (36 Hours)

November 11, 5:00 p.m. - 8:35 p.m.	4
November 12, 8:00 a.m. - 4:20 p.m.	8
November 25, 5:00 p.m. - 8:35 p.m.	4
November 26, 8:00 a.m. - 4:20 p.m.	8
December 9, 5:00 p.m. - 8:35 p.m.	4
December 10, 8:00 a.m. - 4:20 p.m.	8

Retirement Planning (36 Hours)

January 6, 5:00 p.m. - 8:35 p.m.	4
January 7, 8:00 a.m. - 4:20 p.m.	8
January 20, 5:00 p.m. - 8:35 p.m.	4
January 21, 8:00 a.m. - 4:20 p.m.	8
January 27, 5:00 p.m. - 8:35 p.m.*	4
January 28 8:00 a.m. - 4:20 p.m.	8

Income Tax Planning (36 Hours)

February 10, 5:00 p.m. - 8:35 p.m.	4
February 11, 8:00 a.m. - 4:20 p.m.	8
February 24, 5:00 p.m. - 8:35 p.m.	4
February 25, 8:00 a.m. - 4:20 p.m.	8
March 10, 5:00 p.m. - 8:35 p.m.	4
March 11, 8:00 a.m. - 4:20 p.m.	8

Estate Planning (36 Hours)

March 24, 5:00 p.m. - 8:35 p.m.	4
March 25, 8:00 a.m. - 4:20 p.m.	8
April 7, 5:00 p.m. - 8:35 p.m.	4
April 8, 8:00 a.m. - 4:20 p.m.	8
April 21, 5:00 p.m. - 8:35 p.m.	4
April 22, 8:00 a.m. - 4:20 p.m.	8

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

April 28, 5:00 p.m. - 8:35 p.m.*	4
April 29, 8:00 a.m. - 4:20 p.m.	8
May 12, 5:00 p.m. - 8:35 p.m.	4
May 13, 8:00 a.m. - 4:20 p.m.	8
May 26, 5:00 p.m. - 8:35 p.m.	4
May 27, 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.