

Bellarmine University
Executive Certificate in Financial Planning Program
 September 2020 - May 2021

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

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|---------------------------------|---|
| September 11, 5:00 PM - 8:35 PM | 4 |
| September 12, 8:00 AM - 4:20 PM | 8 |
| September 25, 5:00 PM - 8:35 PM | 4 |
| September 26, 8:00 AM - 4:20 PM | 8 |
| October 9, 5:00 PM - 8:35 PM | 4 |
| October 10, 8:00 AM - 4:20 PM | 8 |
| October 23, 5:00 PM - 8:35 PM | 4 |
| October 24, 8:00 AM - 4:20 PM | |

513 - Investment Planning (36 Hours)

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|--------------------------------|---|
| November 6, 5:00 PM - 8:35 PM | 4 |
| November 7, 8:00 AM - 4:20 PM | 8 |
| November 20, 5:00 PM - 8:35 PM | 4 |
| November 21, 8:00 AM - 4:20 PM | 8 |
| December 4, 5:00 PM - 8:35 PM | 4 |
| December 5, 8:00 AM - 4:20 PM | 8 |

515 - Retirement Savings and Income (36 Hours)

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| December 18, 5:00 PM - 8:35 PM | 4 |
| December 19, 8:00 AM - 4:20 PM | 8 |
| January 8, 5:00 PM - 8:35 PM | 4 |
| January 9, 8:00 AM - 4:20 PM | 8 |
| January 22, 5:00 PM - 8:35 PM | 4 |
| January 23, 8:00 AM - 4:20 PM | 8 |

514 - Tax Planning (36 Hours)

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|--------------------------------|---|
| February 5, 5:00 PM - 8:35 PM | 4 |
| February 6, 8:00 AM - 4:20 PM | 8 |
| February 12, 5:00 PM - 8:35 PM | 4 |
| February 13, 8:00 AM - 4:20 PM | 8 |
| February 26, 5:00 PM - 8:35 PM | 4 |
| February 27, 8:00 AM - 4:20 PM | 8 |

516 - Estate Planning (36 Hours)

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|-----------------------------|---|
| March 12, 5:00 PM - 8:35 PM | 4 |
| March 13, 8:00 AM - 4:20 PM | 8 |
| March 19, 5:00 PM - 8:35 PM | 4 |
| March 20, 8:00 AM - 4:20 PM | 8 |
| April 9, 5:00 PM - 8:35 PM | 4 |
| April 10, 8:00 AM - 4:20 PM | 8 |

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

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| April 23, 5:00 PM - 8:35 PM | 4 |
| April 24, 8:00 AM - 4:20 PM | 8 |
| May 7, 5:00 PM - 8:35 PM | 4 |
| May 8, 8:00 AM - 4:20 PM | 8 |
| May 21, 5:00 PM - 8:35 PM | 4 |
| May 22, 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.