

BELLARMINE UNIVERSITY

Executive Certificate in Financial Planning Program September 2019 – May 2020

General Financial Planning Principles, Professional Conduct, & Regulation/Risk Management, Insurance and Employee Benefits (48 Hours)

September 13, 5:00 p.m. – 8:35 p.m.	4
September 14, 8:00 a.m. – 4:20 p.m.	8
September 27, 5:00 p.m. – 8:35 p.m.	4
September 28, 8:00 a.m. – 4:20 p.m.	8
October 11, 5:00 p.m. – 8:35 p.m.	4
October 12, 8:00 a.m. – 4:20 p.m.	8
October 25, 5:00 p.m. – 8:35 p.m.	4
October 26, 8:00 a.m. – 4:20 p.m.	8

Investment Planning (36 Hours)

November 8, 5:00 p.m. – 8:35 p.m.	4
November 9, 8:00 a.m. – 4:20 p.m.	8
November 22, 5:00 p.m. – 8:35 p.m.	4
November 23, 8:00 a.m. – 4:20 p.m.	8
December 6, 5:00 p.m. – 8:35 p.m.	4
December 7, 8:00 a.m. – 4:20 p.m.	8

Retirement Planning (36 Hours)

January 3, 5:00 p.m. – 8:35 p.m.	4
January 4, 8:00 a.m. – 4:20 p.m.	8
January 17, 5:00 p.m. – 8:35 p.m.	4
January 18, 8:00 a.m. – 4:20 p.m.	8
January 31, 5:00 p.m. – 8:35 p.m.	4
February 1, 8:00 a.m. – 4:20 p.m.	8

Income Tax Planning (36 Hours)

February 14, 5:00 p.m. – 8:35 p.m.	4
February 15, 8:00 a.m. – 4:20 p.m.	8
February 28, 5:00 p.m. – 8:35 p.m.	4
February 29, 8:00 a.m. – 4:20 p.m.	8
March 13, 5:00 p.m. – 8:35 p.m.	4
March 14, 8:00 a.m. – 4:20 p.m.	8

Estate Planning (36 Hours)

April 3, 5:00 p.m. – 8:35 p.m.	4
April 4, 8:00 a.m. – 4:20 p.m.	8
April 17, 5:00 p.m. – 8:35 p.m. *	4
April 18, 8:00 a.m. – 4:20 p.m.	8
April 24, 5:00 p.m. – 8:35 p.m.*	4
April 25, 8:00 a.m. – 4:20 p.m.	8

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

May 8, 5:00 p.m. – 8:35 p.m.*	4
May 9, 8:00 a.m. – 4:20 p.m.	8
May 15, 5:00 p.m. – 8:35 p.m.*	4
May 16, 8:00 a.m. – 4:20 p.m.	8
May 29, 5:00 p.m. – 8:35 p.m.	4
May 30, 8:00 a.m. – 4:20 p.m.	8

* Denotes back-to-back weekends

**Note - 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.