CERTIFICATE IN FINANCIAL PLANNING

Live Online via Zoom | Tuesdays | 5:00pm–9:05pm

GENERAL FINANCIAL PRINCIPLES, PROFESSIONAL CONDUCT AND REGULATION	24 HOURS	FEBRUARY 28 – APRIL 11
RISK MANAGEMENT, INSURANCE AND EMPLOYEE BENEFITS PLANNING	20 HOURS	APRIL 25 – MAY 30
INVESTMENT PLANNING	32 HOURS	JUNE 6 – AUGUST 8
TAX PLANNING	32 HOURS	AUGUST 15 – OCTOBER 10
RETIREMENT SAVINGS AND INCOME PLANNING	32 HOURS	OCTOBER 17 – DECEMBER 19
ESTATE PLANNING	32 HOURS	JANUARY 16 – MARCH 12
CAPSTONE – FINANCIAL PLAN DEVELOPMENT	32 HOURS	MARCH 19 – MAY 14

EXAM WEEKS: 4/11/23, 5/30/23, 8/8/23, 10/10/23, 1/9/24, 3/12/24
CLASS WILL NOT MEET: 4/18/23, 7/4/23, 10/31/23, 11/21/23, 12/26/23, 1/2/24, 4/9/24