

Bellarmino University
Executive Certificate in Financial Planning Program
September 2024 - May 2025

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

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

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

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

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

****511 Assessments, quizzes, case study, and final exam due date ----> 9/14/2024**

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

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

Friday, October 4, 5:00 PM - 8:35 PM

Saturday, October 5, 8:00 AM - 4:20 PM

****512 Assessments, quizzes, case study, and final exam due date ----> 10/12/2024**

513 - Investment Planning (36 Hours)

Friday, October 18, 5:00 PM - 8:35 PM

Saturday, October 19, 8:00 AM - 4:20 PM

Friday, November 1, 5:00 PM - 8:35 PM

Saturday, November 2, 8:00 AM - 4:20 PM

Friday, November 15, 5:00 PM - 8:35 PM

Saturday, November 16, 8:00 AM - 4:20 PM

****513 Assessments, quizzes, case study, and final exam due date ----> 11/23/2024**

515 - Retirement Savings and Income (36 Hours)

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

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

Friday, December 13, 5:00 PM - 8:35 PM

Saturday, December 14, 8:00 AM - 4:20 PM

Friday, January 10, 5:00 PM - 8:35 PM

Saturday, January 11, 8:00 AM - 4:20 PM

****515 Assessments, quizzes, case study, and final exam due date ----> 1/18/2025**

514 - Tax Planning (36 Hours)

Friday, January 24, 5:00 PM - 8:35 PM

Saturday, January 25, 8:00 AM - 4:20 PM

Friday, February 7, 5:00 PM - 8:35 PM

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

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

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

****514 Assessments, quizzes, case study, and final exam due date ----> 3/1/2025**

516 - Estate Planning (36 Hours)

Friday, March 7, 5:00 PM - 8:35 PM

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

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

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

Friday, April 4, 5:00 PM - 8:35 PM

Saturday, April 5, 8:00 AM - 4:20 PM

****516 Assessments, quizzes, case study, and final exam due date ----> 4/12/2025**

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

Friday, April 18, 5:00 PM - 8:35 PM

Saturday, April 19, 8:00 AM - 4:20 PM

Friday, April 25, 5:00 PM - 8:35 PM

Saturday, April 26, 8:00 AM - 4:20 PM

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

Saturday, May 10, 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.