

University of Portland
 Executive Certificate in Financial Planning Program
 September 2018- May 2019

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

September 7, 6:00 p.m. - 9:35 p.m.	4
September 8, 8:15 a.m. - 4:30 p.m.	8
September 21, 6:00 p.m. - 9:35 p.m.	4
September 22, 8:15 a.m. - 4:30 p.m.	8
October 5, 6:00 p.m. - 9:35 p.m.	4
October 6, 8:15 a.m. - 4:30 p.m.	8
October 19 6:00 p.m. - 9:35 p.m.	4
October 20, 8:15 a.m. - 4:30 p.m.	8

Investment Planning (36 Hours)

November 2, 6:00 p.m. - 9:35 p.m.	4
November 3, 8:15 a.m. - 4:30 p.m.	8
November 16, 6:00 p.m. - 9:35 p.m.	4
November 17, 8:15 a.m. - 4:30 p.m.	8
November 30, 6:00 p.m. - 9:35 p.m.	4
December 1, 8:15 a.m. - 4:30 p.m.	8

Retirement Savings and Income (36 Hours)

January 4, 6:00 p.m. - 9:35 p.m.	4
January 5, 8:15 a.m. - 4:30 p.m.	8
January 18, 6:00 p.m. - 9:35 p.m.	4
January 19, 8:15 a.m. - 4:30 p.m.*	8
January 25, 6:00 p.m. - 9:35 p.m.*	4
January 26, 8:15 a.m. - 4:30 p.m.*	8

Tax Planning (36 Hours)

February 1, 6:00 p.m. - 9:35 p.m.*	4
February 2, 8:15 a.m. - 4:30 p.m.	8
February 15, 6:00 p.m. - 9:35 p.m.	4
February 16, 8:15 a.m. - 4:30 p.m.	8
March 1, 6:00 p.m. - 9:35 p.m.	4
March 2, 8:15 a.m. - 4:30 p.m.*	8

Estate Planning (36 Hours)

March 8, 6:00 p.m. - 9:35 p.m.*	4
March 9, 8:15 a.m. - 4:30 p.m.	8
March 22, 6:00 p.m. - 9:35 p.m.	4
March 23, 8:15 a.m. - 4:30 p.m.	8
April 5, 6:00 p.m. - 9:35 p.m.	4
April 6, 8:15 a.m. - 4:30 p.m.*	8

Capstone Case Course in Financial Planning (36 Hours)

April 12, 6:00 p.m. - 9:35 p.m.*	4
April 13, 8:15 a.m. - 4:30 p.m.	8
April 26, 6:00 p.m. - 9:35 p.m.	4
April 27, 8:15 a.m. - 4:30 p.m.	8
May 10, 6:00 p.m. - 9:35 p.m.	4
May 11, 8:15 a.m. - 4:30 p.m.	8

*While every effort is made to ensure that classes meet every other weekend, holidays and local events occasionally prevent this accommodation. An asterisk denotes weekends that class meets back-to-back.