University of Portland

Executive Certificate in Financial Planning Program Schedule
September 2019 – May 2020

<u>101 - General Financial Planning Principles, Professional Conduct, and Regulation;</u>
<u>102 - Risk Management, Insurance, and Employee Benefits</u> (48 Hours)

September 6, 5:30 PM – 9:45 PM	4
September 7, 9:00 AM – 5:00 PM	8
September 20, 5:30 PM – 9:45 PM	4
September 21, 9:00 AM – 5:00 PM	8
October 4, 5:30 PM – 9:45 PM	4
October 5, 9:00 AM – 5:00 PM	8
October 18, 5:30 PM – 9:45 PM	4
October 19, 9:00 AM – 5:00 PM	8

<u>103 - Investment Planning</u> (36 Hours)

November 1, 5:30 PM – 9:45 PM	4
November 2, 9:00 AM – 5:00 PM	8
November 15, 5:30 PM – 9:45 PM	4
November 16, 9:00 AM – 5:00 PM	8
December 6, 5:30 PM – 9:45 PM	4
December 7, 9:00 AM – 5:00 PM	8

<u>105 - Retirement Savings and Income</u> (36 Hours)

January 3, 5:30 PM – 9:45 PM	4
January 4, 9:00 AM – 5:00 PM	8
January 17, 5:30 PM – 9:45 PM	4
January 18, 9:00 AM – 5:00 PM	8
January 31, 5:30 PM – 9:45 PM	4
February 1, 9:00 AM – 5:00 PM	8

<u>104 - Tax Planning</u> (36 Hours)

February 7, 5:30 PM – 9:45 PM	4
February 8, 9:00 AM – 5:00 PM	8
February 21, 5:30 PM – 9:45 PM	4
February 22, 9:00 AM – 5:00 PM	8
March 6, 5:30 PM – 9:45 PM	4
March 7, 9:00 AM – 5:00 PM	8

<u>106 - Estate Planning</u> (36 Hours)

March 13, 5:30 PM – 9:45 PM	4
March 14, 9:00 AM – 5:00 PM	8
March 27, 5:30 PM – 9:45 PM	4
March 28, 9:00 AM – 5:00 PM	8
April 3, 5:30 PM – 9:45 PM	4
April 4, 9:00 AM – 5:00 PM	8

<u>107 - Capstone Case Course in Financial Planning</u> (36 Hours)**

April 17, 5:30 PM – 9:45 PM	4
April 18, 9:00 AM – 5:00 PM	8
May 1, 5:30 PM – 9:45 PM	4
May 2, 9:00 AM – 5:00 PM	8
May 15, 5:30 PM – 9:45 PM	4
May 16, 9:00 AM – 5:00 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.