

University of Portland
Executive Certificate in Financial Planning Program
 September 2017- May 2018

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

September 8, 6:00 p.m. - 9:35 p.m.	4
September 9, 8:15 a.m. - 4:30 p.m.	8
September 22, 6:00 p.m. - 9:35 p.m.	4
September 23, 8:15 a.m. - 4:30 p.m.	8
October 6, 6:00 p.m. - 9:35 p.m.*	4
October 7, 8:15 a.m. - 4:30 p.m.	8
October 20, 6:00 p.m. - 9:35 p.m.	4
October 21, 8:15 a.m. - 4:30 p.m.	8

Investment Planning (36 Hours)

November 3, 6:00 p.m. - 9:35 p.m.	4
November 4, 8:15 a.m. - 4:30 p.m.	8
November 17, 6:00 p.m. - 9:35 p.m.	4
November 18, 8:15 a.m. - 4:30 p.m.	8
December 1, 6:00 p.m. - 9:35 p.m.	4
December 2, 8:15 a.m. - 4:30 p.m.	8

Retirement Savings and Income (36 Hours)

January 5, 6:00 p.m. - 9:35 p.m.	4
January 6, 8:15 a.m. - 4:30 p.m.	8
January 19, 6:00 p.m. - 9:35 p.m.	4
January 20, 8:15 a.m. - 4:30 p.m.*	8
January 26, 6:00 p.m. - 9:35 p.m.*	4
January 27, 8:15 a.m. - 4:30 p.m.*	8

Tax Planning (36 Hours)

February 2, 6:00 p.m. - 9:35 p.m.*	4
February 3, 8:15 a.m. - 4:30 p.m.	8
February 16, 6:00 p.m. - 9:35 p.m.	4
February 17, 8:15 a.m. - 4:30 p.m.	8
March 2, 6:00 p.m. - 9:35 p.m.	4
March 3, 8:15 a.m. - 4:30 p.m.*	8

Estate Planning (36 Hours)

March 9, 6:00 p.m. - 9:35 p.m.*	4
March 10, 8:15 a.m. - 4:30 p.m.	8
March 23, 6:00 p.m. - 9:35 p.m.	4
March 24, 8:15 a.m. - 4:30 p.m.	8
April 6, 6:00 p.m. - 9:35 p.m.	4
April 7, 8:15 a.m. - 4:30 p.m.*	8

Capstone Case Course in Financial Planning (36 Hours)

April 13, 6:00 p.m. - 9:35 p.m.*	4
April 14, 8:15 a.m. - 4:30 p.m.	8
April 27, 6:00 p.m. - 9:35 p.m.	4
April 28, 8:15 a.m. - 4:30 p.m.	8
May 11, 6:00 p.m. - 9:35 p.m.	4
May 12, 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.