

**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 26, 6:00 p.m. - 9:35 p.m.	4
October 27, 8:15 a.m. - 4:30 p.m.	8

**Investment Planning (36 Hours)**

November 9, 6:00 p.m. - 9:35 p.m.	4
November 10, 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
December 14, 6:00 p.m. - 9:35 p.m.	4
December 15, 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.