

Winthrop University
Executive Certificate in Financial Planning Program
 September 2020 - May 2021

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

September 11, 6:00 PM - 9:35 PM	4
September 12, 8:45 AM - 5:00 PM	8
September 25, 6:00 PM - 9:35 PM	4
September 26, 8:45 AM - 5:00 PM	8
October 9, 6:00 PM - 9:35 PM	4
October 10, 8:45 AM - 5:00 PM	8
October 23, 6:00 PM - 9:35 PM	4
October 24, 8:45 AM - 5:00 PM	8

513 - Investment Planning (36 Hours)

November 6, 6:00 PM - 9:35 PM	4
November 7, 8:45 AM - 5:00 PM	8
November 20, 6:00 PM - 9:35 PM	4
November 21, 8:45 AM - 5:00 PM	8
December 4, 6:00 PM - 9:35 PM	4
December 5, 8:45 AM - 5:00 PM	8

515 - Retirement Savings and Income (36 Hours)

January 8, 6:00 PM - 9:35 PM	4
January 9, 8:45 AM - 5:00 PM	8
January 22, 6:00 PM - 9:35 PM	4
January 23, 8:45 AM - 5:00 PM	8
February 5, 6:00 PM - 9:35 PM	4
February 6, 8:45 AM - 5:00 PM	8

514 - Tax Planning (36 Hours)

February 12, 6:00 PM - 9:35 PM	4
February 13, 8:45 AM - 5:00 PM	8
February 26, 6:00 PM - 9:35 PM	4
February 27, 8:45 AM - 5:00 PM	8
March 12, 6:00 PM - 9:35 PM	4
March 13, 8:45 AM - 5:00 PM	8

516 - Estate Planning (36 Hours)

March 19, 6:00 PM - 9:35 PM	4
March 20, 8:45 AM - 5:00 PM	8
April 9, 6:00 PM - 9:35 PM	4
April 10, 8:45 AM - 5:00 PM	8
April 23, 6:00 PM - 9:35 PM	4
April 24, 8:45 AM - 5:00 PM	8

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

April 30, 6:00 PM - 9:35 PM	4
May 1, 8:45 AM - 5:00 PM	8
May 7, 6:00 PM - 9:35 PM	4
May 8, 8:45 AM - 5:00 PM	8
May 21, 6:00 PM - 9:35 PM	4
May 22, 8:45 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.