Duke | CONTINUING STUDIES

Certificate in Financial Planning Fall 2021 Schedule

General Financial Planning Principles, Professional Conduct, and Regulation (24 Hours)

Tom Pemberton

- September 10, 6:00 PM – 9:35 PM
- September 11, 8:15 AM - 4:30 PM
- September 24, 6:00 PM – 9:35 PM
- September 25, 8:15 AM - 4:30 PM

Risk Management, Insurance, and Employee Benefits Planning (24 Hours)

Bill Yurkovac

- October 8, 6:00 PM – 9:35 PM
- October 9, 8:15 AM - 4:30 PM
- October 22, 6:00 PM – 9:35 PM
- October 23, 8:15 AM – 4:30 PM

Investment Planning (36 Hours)

Tom Pemberton

- November 5, 6:00 PM - 9:35 PM
- November 6, 8:15 AM - 4:30 PM
- November 19, 6:00 PM - 9:35 PM
- November 20, 8:15 AM - 4:30 PM
- December 3, 6:00 PM - 9:35 PM
- December 4, 8:15 AM - 4:30 PM

Tax Planning (36 Hours)

Dave Ness

- December 17, 6:00 PM - 9:35 PM
- December 18, 8:15 AM - 4:30 PM
- January 7, 6:00 PM - 9:35 PM
- January 8, 8:15 AM - 4:30 PM
- January 21, 6:00 PM - 9:35 PM
- January 22, 8:15 AM - 4:30 PM

Retirement, Savings and Employee Benefits (36 Hours)

Geoff White

- February 4, 6:00 PM - 9:35 PM
- February 5, 8:15 AM - 4:30 PM
- February 18, 6:00 PM - 9:35 PM
- February 19, 8:15 AM - 4:30 PM
- March 4, 6:00 PM - 9:35 PM
- March 5, 8:15 AM - 4:30 PM

Estate Planning (36 Hours)

Tom Pemberton

- March 18, 6:00 PM - 9:35 PM
- March 19, 8:15 AM - 4:30 PM
- April 1, 6:00 PM - 9:35 PM
- April 2, 8:15 AM - 4:30 PM **
- April 8, 6:00 PM - 9:35 PM **
- April 9, 8:15 AM - 4:30 PM

Capstone Case Financial Plan Development (36 Hours)

Dave Ness

- April 22, 6:00 PM - 9:35 PM
- April 23, 8:15 AM - 4:30 PM
- May 6, 6:00 PM - 9:35 PM
- May 7, 8:15 AM - 4:30 PM
- May 20, 6:00 PM - 9:35 PM
- May 21, 8:15 AM - 4:30 PM

**** Denotes back to back weekends**