

**Duke University**  
**Executive Certificate in Financial Planning Program**  
**Schedule September 2020- May 2021**

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

September 11, 6:00 PM - 9:35 PM	4
September 12, 8:15 AM - 4:30 PM	8
September 25, 6:00 PM - 9:35 PM	4
September 26, 8:15 AM - 4:30 PM	8
October 9, 6:00 PM - 9:35 PM	4
October 10, 8:15 AM - 4:30 PM*	8
October 23, 6:00 PM - 9:35 PM*	4
October 24, 8:15 AM - 4:30 PM	8

**Investment Planning (36 Hours)**

November 6, 6:00 PM - 9:35 PM	4
November 7, 8:15 AM - 4:30 PM	8
November 20, 6:00 PM - 9:35 PM	4
November 21, 8:15 AM - 4:30 PM	8
December 4, 6:00 PM - 9:35 PM	4
December 5, 8:15 AM - 4:30 PM	8

**Retirement Savings and Income Planning (36 Hours)**

December 18, 6:00 PM - 9:35 PM	4
December 19, 8:15 AM - 4:30 PM	8
January 8, 6:00 PM - 9:35 PM	4
January 9, 8:15 AM - 4:30 PM*	8
January 15, 6:00 PM - 9:35 PM*	4
January 16, 8:15 AM - 4:30 PM	8

**Tax Planning (36 Hours)**

January 29, 6:00 PM - 9:35 PM	4
January 30, 8:15 AM - 4:30 PM	8
February 12, 6:00 PM - 9:35 PM	4
February 13, 8:15 AM - 4:30 PM	8
February 26, 6:00 PM - 9:35 PM	4
February 27, 8:15 AM - 4:30 PM	8

**Estate Planning (36 Hours)**

March 12, 6:00 PM - 9:35 PM	4
March 13, 8:15 AM - 4:30 PM	8
March 26, 6:00 PM - 9:35 PM	4
March 27, 8:15 AM - 4:30 PM	8
April 9, 6:00 PM - 9:35 PM	4
April 10, 8:15 AM - 4:30 PM	8

**Capstone Case Course (Financial Planning Development) (36 Hours)**

April 23, 6:00 PM - 9:35 PM	4
April 24, 8:15 AM - 4:30 PM	8
May 7, 6:00 PM - 9:35 PM	4
May 8, 8:15 AM - 4:30 PM	8
May 21, 6:00 PM - 9:35 PM	4
May 22, 8:15 AM - 4:30 PM	8

\* Denotes back-to-back weekends.

\*\*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.