

UNIVERSITY OF ST. THOMAS
CFP® Certification Education Program
Nine Month Financial Planning Program
Fall 2009/Spring 2010 Schedule

Session I – Fall 2009

Friday 6-10 PM

Saturday 8 AM to Noon

Saturday 1 -5 PM

9-11 Intro – Fundamentals	9-12 Intro - TVM	9-12 Intro - TVM
9-18 Tax	9-19 Investments	9-19 Fundamentals
10-2 Tax	10-3 Investments	10-3 Fundamentals
10-16 Tax	10-17 Investments	10-17 Fundamentals
10-30 Insurance	10-31 Investments	10-31 Tax
11-13 Tax	11-14 Investments	11-14 Insurance
11-20 Tax	11-21 Investments	11-21 Insurance
12-4 Tax	12-5 Investments	12-5 Insurance
12-18 Tax	12-19 Investments	12-19 Insurance

TVM = Time Value of Money

Session II – Spring 2010

Friday 6-10 PM

Saturday 8 AM to Noon

Saturday 1 -5 PM

2-5 Retirement	2-6 Estates / Trusts	2-6 Fin Plan Cases
2-19 Retirement	2-20 Estates / Trusts	2-20 Fin Plan Cases
3-5 Retirement	3-6 Estates / Trusts	3-6 Fin Plan Cases
3-19 Retirement	3-20 Estates / Trusts	3-20 Fin Plan Cases
4-9 Retirement	4-10 Estates / Trusts	4-10 Fin Plan Cases
4-16 Retirement	4-17 Estates / Trusts	4-17 Fin Plan Cases
4-30 Retirement	5-1 Estates / Trusts	5-1 Fin Plan Cases
5-14 Retirement	5-15 Estates / Trusts	5-15 Fin Plan Cases

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, Certified Financial Planner™ and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

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