

Duquesne University
Executive Certificate in Financial Planning Program
September 2024 – May 2025

511 - General Financial Planning Principles, Professional Conduct, and Regulation (24

Friday, August 23, 2024	5-9:00 pm	4
Saturday, August 24, 2024	9am to 5pm	8
Friday, September 6, 2024	5-9:00 pm	4
Saturday, September 7, 2024	9am to 5pm	8
**Assessments, quizzes, case study, and final exam due date		9/14/2024

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

Friday, September 20, 2024	5-9:00 pm	4
Saturday, September 21, 2024	9am to 5pm	8
Friday, October 4, 2024	5-9:00 pm	4
Saturday, October 5, 2024	9am to 5pm	8
**Assessments, quizzes, case study, and final exam due date		10/12/2024

513 - Investment Planning (36 Hours)

Friday, October 18, 2024	5-9:00 pm	4
Saturday, October 19, 2024	9am to 5pm	8
Friday, November 8, 2024	5-9:00 pm	4
Saturday, November 9, 2024	9am to 5pm	8
Friday, November 15, 2024	5-9:00 pm	4
Saturday, November 16, 2024	9am to 5pm	8
**Assessments, quizzes, case study, and final exam due date		11/23/2024

514 - Tax Planning (36 Hours)

Friday, December 6, 2024	5-9:00 pm	4
Saturday, December 7, 2024	9am to 5pm	8
* Friday, January 10, 2025	5-9:00 pm	4
* Saturday, January 11, 2025	9am to 5pm	8
* Friday, January 17, 2025	5-9:00 pm	4
* Saturday, January 18, 2025	9am to 5pm	8
**Assessments, quizzes, case study, and final exam due date		1/25/2025

515 - Retirement, Savings and Employee Benefits (36 Hours)

Friday, January 31, 2025	5-9:00 pm	4
Saturday, February 1, 2025	9am to 5pm	8
Friday, February 14, 2025	5-9:00 pm	4
Saturday, February 15, 2025	9am to 5pm	8
Friday, February 28, 2025	5-9:00 pm	4
Saturday, March 1, 2025	9am to 5pm	8
**Assessments, quizzes, case study, and final exam due date		3/8/2025

516 - Estate Planning (36 Hours)

Friday, March 14, 2025	5-9:00 pm	4
Saturday, March 15, 2025	9am to 5pm	8
Friday, March 28, 2025	5-9:00 pm	4
Saturday, March 29, 2025	9am to 5pm	8
Friday, April 11, 2025	5-9:00 pm	4
Saturday, April 12, 2025	9am to 5pm	8
**Assessments, quizzes, case study, and final exam due date		4/19/2025

517 - Capstone Case Financial Plan Development (36 Hours)***

* Friday, April 25, 2025	5-9:00 pm	4
* Saturday, April 26, 2025	9am to 5pm	8
* Friday, May 2, 2025	5-9:00 pm	4
* Saturday, May 3, 2025	9am to 5pm	8
Friday, May 16, 2025	5-9:00 pm	4
Saturday, May 17, 2025	9am to 5pm	8
**Assessments, quizzes, case study, and final exam due date		TBD

* Denotes back-to-back weekends.

** Assessments are mandatory, all online, and consist of eight (8) quizzes, one (1) case study, one (1) practice exam, and one (1) final exam due one week at 11.59pm from the end of the material. (e.g. If class ends on September 30, all assessments are due October 7.) There are required assessments for each Kaplan section – 511, 512, 513, 514, 515, 516, and 517.

*** 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.