

OAKLAND UNIVERSITY EXECUTIVE PROGRAM 2018

COURSE	PERSONAL FINANCIAL PLANNING
PROGRAM DIRECTOR	LORI OANCEA, J.D.

Each course is held for 7 weeks at the University Center in Auburn Hills, MI every Wednesday from 6:00 p.m. to 9:30 p.m. Combined with quizzes and homework assignments, total of 45 content hours of preparation for the Certified Financial Planner (CFP®) certification.

Exam Review course is a separate comprehensive course, scheduled for 2 sessions over 2 separate weekends, Th, F & S, in preparation for the March CFP exam

PFP COURSES	STARTING	ENDING	EXAM REVIEW COURSE 2018	STARTING	ENDING
INVESTMENTS & FIN CALC (37100)	FEB 7	MARCH 28	SESSION 1 - 2.5 DAYS	TH - FEB. 15	SAT. - FEB. 17
TAXATION (37150)	APRIL 4	MAY 23	SESSION 2 - 2.5 DAYS	TH - MARCH 1	SAT. - MARCH 3
RISK MANAGEMENT (37050)	MAY 30	JULY 25			
RETIREMENT PLANNING (37200)	AUG 1	SEPT 19	TH 5:00 - 9:00 PM		
ESTATE PLANNING (37250)	SEPT 26	NOV 14	FRI 8:00 AM - 5:00 PM		
FINANCIAL PLAN DEVELOPMENT (37300)	NOV 28	JAN 23	SAT 8:00 AM - 5:00 PM		

FEBRUARY							MARCH							APRIL							MAY							JUNE							JULY						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3				1	2	3	1	2	3	4	5	6	7			1	2	3	4	5						1	2	1	2	3	4	5	6	7	
4	5	6	7	8	9	10	4	5	6	7	8	9	10	8	9	10	11	12	13	14	6	7	8	9	10	11	12	3	4	5	6	7	8	9	8	9	10	11	12	13	14
11	12	13	14	15	16	17	11	12	13	14	15	16	17	15	16	17	18	19	20	21	13	14	15	16	17	18	19	10	11	12	13	14	15	16	15	16	17	18	19	20	21
18	19	20	21	22	23	24	18	19	20	21	22	23	24	22	23	24	25	26	27	28	20	21	22	23	24	25	26	17	18	19	20	21	22	23	22	23	24	25	26	27	28
25	26	27	28				25	26	27	28	29	30	31	29	30						27	28	29	30	31			24	25	26	27	28	29	30	29	30	31				

AUGUST							SEPTEMBER							OCTOBER							NOVEMBER							DECEMBER							JANUARY (2019)						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
			1	2	3	4						1	1	2	3	4	5	6					1	2	3						1			1	2	3	4	5			
5	6	7	8	9	10	11	2	3	4	5	6	7	8	7	8	9	10	11	12	13	4	5	6	7	8	9	10	2	3	4	5	6	7	8	6	7	8	9	10	11	12
12	13	14	15	16	17	18	9	10	11	12	13	14	15	14	15	16	17	18	19	20	11	12	13	14	15	16	17	9	10	11	12	13	14	15	13	14	15	16	17	18	19
19	20	21	22	23	24	25	16	17	18	19	20	21	22	21	22	23	24	25	26	27	18	19	20	21	22	23	24	16	17	18	19	20	21	22	20	21	22	23	24	25	26
26	27	28	29	30	31		23	24	25	26	27	28	29	28	29	30	31				25	26	27	28	29	30		23	24	25	26	27	28	29	27	28	29	30	31		
							30																					30	31												