

(Condensed to 8 class weeks for the March exam cycle due to holidays)					
Total Study Schedule Covers 13 Weeks					
Week of	Pre-Study materials to review	Class #	Class Date	Instructor	Class Agenda
	*Note: The time required to complete all pre-study assignments before class will increase with the level of difficulty of the materials in the last 5 weeks of class. Get ahead of the study schedule in the early weeks if you are able.		All classes are 6:00pm - 9:15pm ET (recorded for those who cannot attend live)		
Dec. 17 - 30, 2018 (Due to holidays: 2 weeks, 10 study days of your choice)					
Day 1	1. Watch the kick-off call (27 minutes) 2. Read Study Guide Section 1 - Exam Information (12 pages); Section 2 - Time Value of Money (27 pages)				
Day 2	Watch Pre-Study Lectures (3) - TVM Basics (55 min); Education & Retirement Funding (40 min); and NPV (27 min)		No class these weeks		
Day 3	1. Read Fundamentals & Insurance Pre-Study book - Fundamentals Lesson 1: Ethics, Law, and Code of Ethics (29 pages) 2. Watch Pre-Study Lectures (2) - Code of Ethics Part 1 (33 min), and Code of Ethics Part 2 (34 min)				
Day 4	Read Fundamentals & Insurance Pre-Study book - Fundamentals Lesson 2: Registered Investment Advisors (6 pages); Lesson 3: Economic Business Cycle, Consumer Protection (29 pages); Lesson 4: Internal Analysis (4 pages); and Lesson 5: Financial Statements and Analysis (17 pages)				
Day 5	Read Fundamentals & Insurance Pre-Study book - Fundamentals Lesson 6: Education Planning (13 pages); Insurance Lesson 1: Principles of Insurance (19 pages)				
Day 6	Read Fundamentals & Insurance Pre-Study book - Insurance Lesson 2: Life, Health, and Disability Insurance (37 pages)				
Day 7	1. Watch Pre-Study Lectures - Life Insurance Taxation and Use (1 hr 27 min) 2. Read Fundamentals & Insurance Pre-Study book - Insurance Lesson 3: Personal Property and Liability Insurance (17 pages); Lesson 4: Social Security (9 pages)				
Day 8	Read Investment Planning Pre-Study book - Lesson 1: Fundamentals of Investments (17 pages); Lesson 2: Portfolio Theory (30 pages); Lesson 3: Measuring Return (15 pages)				
Day 9	Watch Pre-Study Lectures (2) - Measuring Risk Using Beta and STD (48 min); Modern Portfolio Theory (43min)				
Day 10					
Dec. 31, 2018 - Jan. 6, 2019					
Monday	Read Investment Planning Pre-Study book - Lesson 4: Stock Valuation and Ratio Analysis (18 pages); Lesson 5: Bonds (10 pages); Lesson 6: Bond Valuation (21 pages)				
Tuesday	Read Investment Planning Pre-Study book - Lesson 7: Investment Companies (6 pages); Lesson 8: Derivatives (15 pages)				
Wednesday	1. Watch Pre-Study Lectures (2) - Bond Valuation & Duration (50 min); Derivatives (Options & Futures) (44min)				
Thursday		1	Thursday, January 3	Sherri Donaldson	Introduction (slides 1-6), Fundamentals (slides 1-88)
Friday	Attend Office Hours - January 4, 4:30-6:30pm ET (or listen to recording)				
Saturday	1. Read Income Tax Planning Pre-Study book - Lesson 1: Property Taxation (40 pages); Lesson 2: Basic Income Tax (57 pages)				
Sunday	Day off to rest				
Jan. 7 - 13, 2019					
Monday	Read Income Tax Planning Pre-Study book - Lesson 3: Administrative (10 pages); Lesson 4: Depreciation, Amortization, and Depletion (14 pages); Lesson 5: Entities (31 pages)				
Tuesday		2	Tuesday, January 8	Sherri Donaldson	Fundamentals (slides 88-185)
Wednesday	Take the Review Readiness Quiz (TDR - 50 questions / 150 min) Take the Review Readiness Quiz (GTPR - 100 questions / 300 min)				
Thursday	Watch Pre-Study Lectures (8) - AMT (22 min); Basic Income Tax (32min); Business Assets (14 min); Calculating Basis (28 min); Consequences of Property (17 min); Depreciation (MACRS) (10 min); Entity Choice (7 min); Income Tax Administration (28 min)				
Friday	Attend Office Hours - January 11, 4:30-6:30pm ET (or listen to recording)				

Saturday	Watch Pre-Study Lectures (5) - Itemized Deductions - Charity (23 min); Itemized Deductions - Medical (16 min); Nontaxable Exchanges (13 min); Passive Activities and Like-Kind Exchanges (26 min); Personal Rentals - Personal Real Estate Rentals (24 min)				
	Read Retirement Planning Pre-Study book -Lesson 1: Introduction to Qualified Plans (35 pages)				
Sunday	Day off to rest				
Jan. 14 - 20, 2019					
Monday	Read Retirement Planning Pre-Study book - Lesson 2: Pension Plans and Profit Sharing Plans (49 pages)				
Tuesday		3	Tuesday, January 15	Sherri Donaldson	Fundamentals (slides 186-217), Insurance (slides 1-72)
Wednesday	Take the Fundamentals Practice Exam in the Fundamentals & Insurance Pre-Study book (20 questions)				
Thursday	Take at least 5 predefined quizzes on Fundamentals				
Friday	Attend Office Hours - January 18, 4:30-6:30pm ET (or listen to recording)				
Saturday	Take all remaining predefined quizzes on Fundamentals				
Sunday	Day off to rest				
Jan. 21 - 27, 2019					
Monday	Read Retirement Planning Pre-Study book - Lesson 3: Administration of Qualified Plans (41 pages)				
	GTPR only - Schedule Review Readiness Coaching Session this week				
Tuesday		4	Tuesday, January 22	Sherri Donaldson	Insurance (slides 73-180)
Wednesday	Take the Insurance Practice Exam in the Fundamentals & Insurance Pre-Study book (33 questions)				
Thursday		5	Thursday, January 24	Sherri Donaldson	Investments (slides 1-93)
Friday	Attend Office Hours - January 25, 4:30-6:30pm ET (or listen to recording)				
Saturday	Take a least 4 predefined quizzes on Insurance				
Sunday	Day off to rest				
Jan. 28 - Feb. 3, 2019					
Monday	Take all remaining predefined quizzes on Insurance				
Tuesday		6	Tuesday, January 29	Sherri Donaldson	Investments (slides 94-197)
Wednesday	Take the Investments Practice Exam in the Investment Planning Pre-Study book (50 questions)				
Thursday	Take at least 4 predefined quizzes on Investments				
Friday		7	Friday, February 1	Sherri Donaldson	Income Tax (slides 1-91)
Saturday	Take all remaining predefined quizzes on Investments				
Sunday	Day off to rest				
Feb. 4 - 10, 2019					
Monday	Watch Pre-Study Lectures (5) - Leveraged ESOPs (8 min); Life Insurance in Retirement Plans (11 min); Qualified Plan Distributions (55 min); Qualified Plan Limits (27 min); Coverage and ADP/ACP Testing (19 min)				
Tuesday		8	Tuesday, February 5	Sherri Donaldson	Income Tax (slides 92-100), Retirement (slides 1-92)
Wednesday	1. Take the Tax Practice Exam in the Income Tax Planning Pre-Study book (28 questions)				
	2. Take at least 3 predefined quizzes on Income Tax				
Thursday	Take at least 4 predefined quizzes on Income Tax				
Friday	Take all remaining predefined quizzes on Income Tax				
Saturday	1. Read Retirement Planning Pre-Study book -Lesson 4: Other Tax-Advantaged Plans (45 pages)				
	2. Watch Pre-Study Lectures (5) - IRAs (25 min); Roth IRA Distributions (26 min); Roth IRA vs Roth 401k (11 min); SEPs (10 min); SIMPLEs (15 min)				
	GTPR only - Watch supplemental lectures - Ethics (2.3 hr)				
	GTPR only - Take the Supplemental Quiz on Ethics (29 questions)				
Sunday	Day off to rest				
Feb. 11 - 17, 2019					
Monday	1. Watch Pre-Study Lectures (1) - Fringe Benefits (26 min)				
	2. Read Retirement Planning Pre-Study book - Lesson 5: Deferred Compensation and Employee Benefits (44 pages)				
	GTPR only - Watch supplemental lectures - Ethics Quiz Answers (1 hour)				
Tuesday		9	Tuesday, February 12	Sherri Donaldson	Retirement (slides 93-169), Estate (slides 1-16)
Wednesday	1. Take the Retirement Practice Exam in the Retirement Planning Pre-Study book (36 questions)				
	2. Take at least 4 predefined quizzes on Retirement				
	GTPR only - Watch supplemental lectures - Retirement (2 hr 40 min)				
Thursday	Take all remaining predefined quizzes on Retirement				
Friday	Read Estate Planning Pre-Study book -Lesson 1: Fundamentals of Estate Planning (32 pages); Lesson 2: Gift and Estate Taxes (49 pages)				
Saturday	Read Estate Planning Pre-Study book - Lesson 3: Transfers Outright and In Trust (50 pages)				
	GTPR only - Take the Supplemental Quiz and mini case on Retirement (50 questions)				
Sunday	Day off to rest				
Feb. 18 - 24, 2019					

Monday	Read Estate Planning Pre-Study book - Lesson 4: Advanced Estate Planning (45 pages)				
	GTPR only - Watch supplemental lectures - Retirement Quiz Answers (1 hr 37 min)				
Tuesday		10	Tuesday, February 19	Sherri Donaldson	Estate (slides 17-121)
Wednesday	Watch Pre-Study Lectures (4) - Estate Tax (34 min); Gift Tax 35 min); GSTT (33 min); Trusts (44 min)				
Thursday	1. Take the Estate Practice Exam in the Estate Planning Pre-Study book (33 questions)				
	2. Take at least 3 predefined quizzes on Estate				
Friday	Take at least 5 predefined quizzes on Estate				
Saturday	Take all remaining predefined quizzes on Estate				
	GTPR only - Watch supplemental lectures - Tax (2 hr 50 min)				
	GTPR only - Take the Supplemental Quiz on Tax (44 questions)				
Sunday	Take the Exam Readiness Quiz Feb. 21-25 (50 questions / 100 min)				
Feb. 25 - Mar. 3, 2018					
Monday	Testbank - missed questions and custom quizzes				
	GTPR only - attend your Exam Readiness Coaching Session this week				
	GTPR only - Watch supplemental lectures - Tax Quiz Answers (1 hr 50 min)				
Tuesday	Hoffman case				
Wednesday	Jones & Revak cases				
	GTPR only - Watch supplemental lectures - Estate (6 hrs 44 min)				
Thursday	Study Guide Cases and TVM				
	GTPR only - Watch any supplemental lectures on Estate that you did not finish Wednesday				
Friday	Item Sets & Hot Questions				
Saturday	Simulated Exam				
	GTPR only - Take the Supplemental Quiz on Estate (29 questions)				
	GTPR only - Watch supplemental lectures - Estate Quiz Answers (1 hr 1 min)				
Sunday	Day off to rest				
Mar. 4 - 10, 2018					
Monday	Review missed questions from Simulated Exam				
Tuesday	Review missed questions from Simulated Exam				
Wednesday	Item Sets & Hot Questions				
Thursday					
Friday	Attend Office Hours - Mar. 8, 4:15 - 6:15pm ET (Fund/Ins/Invest) 6:30 - 8:30pm ET (Tax/Retire/Estate)				
Saturday	Testbank - missed questions and custom quizzes				
Sunday					
Mar. 11 - 19, 2018	EXAM WEEK				
	Testbank - missed questions and custom quizzes				
	Light overall review 3-4 days before exam				
	Practice your brain dump				
	The day before your exam read Lesson 1 (containing CFP Board's Code of Ethics) in the Fundamentals & Insurance Pre-Study book				
	Stop studying by noon the day before your exam, then relax and sleep well				
	PASS THE EXAM!				