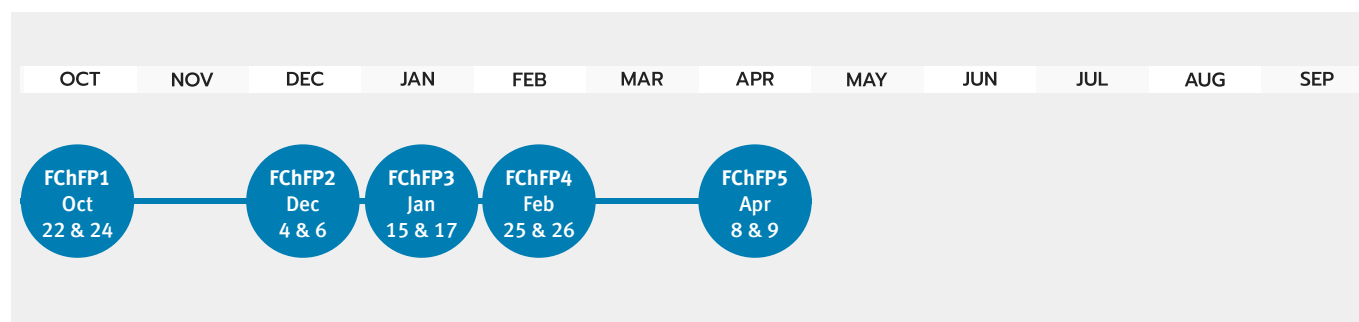


## Cohort 5, 2024 – Key Study Dates and Training Times



\*Workshop attendance dates shown above, is the duration of a nominated cohort journey in sequential subject order for completion in less than 12 months.

### Subject 1: Principals of Financial Planning

|                                   | October 2024                           |
|-----------------------------------|--|
| Online access to subject material | Monday, 7 October                      |
| Face to Face Workshop 1           | Tuesday, 22 October @ 9:00am – 3.00pm  |
| Face to Face Workshop 2           | Thursday, 24 October @ 9:00am – 3.00pm |
| Exam                              | Friday, 1 November                     |

### Subject 2: Wealth Creation and Retirement Planning

|                                   | December 2024                           |
|-----------------------------------|---|
| Online access to subject material | Monday, 25 November                     |
| Face to Face Workshop 1           | Wednesday, 4 December @ 9:00am – 3.00pm |
| Face to Face Workshop 2           | Friday, 6 December @ 9:00am – 3.00pm    |
| Exam                              | Monday, 16 December                     |

## *Subject 3: Estate and Succession Planning*

|                                   | January 2025                            |
|-----------------------------------|---|
| Online access to subject material | Monday, 6 January                       |
| Face to Face Workshop 1           | Wednesday, 15 January @ 9:00am – 3.00pm |
| Face to Face Workshop 2           | Friday, 17 January @ 9:00am – 3.00pm    |
| Exam                              | Monday, 27 January                      |

## *Subject 4: Personal and Business Insurance*

|                                   | February 2025                            |
|-----------------------------------|--|
| Online access to subject material | Monday, 17 February                      |
| Face to Face Workshop 1           | Tuesday, 25 February @ 9:00am – 3.00pm   |
| Face to Face Workshop 2           | Wednesday, 26 February @ 9:00am – 3.00pm |
| Exam                              | Friday, 7 March                          |

## *Subject 5: Client Engagement and Financial Planning Practice*

|                                   | April 2025                           |
|-----------------------------------|--------------------------------------|
| Online access to subject material | Monday, 31 March                     |
| Face to Face Workshop 1           | Tuesday, 8 April @ 9:00am – 3.00pm   |
| Face to Face Workshop 2           | Wednesday, 9 April @ 9:00am – 3.00pm |
| Assignment due                    | Friday, 18 April                     |