

### General

#### RESIDENCY I

GS 803 Financial Statements and Business  
Business Valuation Analysis

GS 831 Ethics and Human Values

#### REQUIRED COURSES

GS 811 Security Analysis and Portfolio Management

GS 814 Qualified Retirement Plans

GS 815 Advanced Estate Planning

GS 817 Personal Tax Planning *As a CAP®  
designee, take 9  
additional courses.*

GS 842 Executive Compensation

#### ELECTIVES (CHOOSE THREE)

GS 838 Business Succession Planning

GS 839 Planning for Impact in the Context  
of Family Wealth (CAP® Course)

GS 840 Building and Managing  
Financial Advisory Practice

GS 849 Charitable Giving Strategies (CAP® Course)

GS 859 Gift Planning in a Nonprofit  
Context (CAP® Course)

#### RESIDENCY II

GS 807 MSFS Case Study Project

GS 808 Issues in Advanced Retirement Planning

### Retirement Planning

#### RESIDENCY I

GS 803 Financial Statements and Business  
Business Valuation Analysis

GS 831 Ethics and Human Values

#### REQUIRED COURSES (RICP®)

GS 811 Security Analysis and Portfolio Management

GS 814 Qualified Retirement Plans

GS 815 Advanced Estate Planning *As an RICP®  
designee, take 9  
additional courses.*

GS 817 Personal Tax Planning

GS 842 Executive Compensation

#### (RICP® COURSES)

HS 353 Retirement Income Process,  
Strategies, and Solutions

HS 354 Sources of Retirement Income

HS 355 Managing the Retirement Income Plan

#### RESIDENCY II

GS 807 MSFS Case Study Project

GS 808 Issues in Advanced Retirement Planning

### Legacy Planning

#### PRE-REQUISITE

GS 839 Planning for Impact in the Context  
of Family Wealth (CAP® Course)

#### RESIDENCY I

GS 869 Legacy Planning Reimagined

GS 831 Ethics and Human Values

#### REQUIRED COURSES

GS 815 Advanced Estate Planning

GS 817 Personal Tax Planning

GS 838 Business Succession Planning

#### (CAP® COURSES)

GS 849 Charitable Giving Strategies

GS 859 Gift Planning in a Nonprofit Context

#### (RICP® COURSES)

HS 353 Retirement Income Process, Strategies

HS 354 Sources of Retirement Income

HS 355 Managing the Retirement Plan

#### RESIDENCY II

GS 807 MSFS Case Study Project

GS 808 Issues in Advanced Retirement Planning

*As a CAP®, and  
RICP® designee,  
take 7 additional  
courses.*