Strategic Wealth 360
2018 Schedule

January Session – 2018

	Registration Deadline	***January 1***
Week 1	*Start date*	*January 2*
	Receive Mock Client Interview/Wealth Plan Presentation booking instructions	*January 5*
Week 2	*Deadline to book Mock Client Interview*	*January 12*
Week 3	*Receive Mock Client Interview conference call confirmation*	*January 19*
Weeks 4 – 8	*Conduct Mock Client Interview*	*January 22 - 26*
	Mock Client Interview synopsis made accessible online	*January 26 – 3:00 pm ET*
	Build your wealth plan	*January 26 –February 25*
Week 9	*Submit wealth plan*	*February 25 – 11:59 pm ET*
Week 11	*Oral presentation*	*March 12 – 16*
Week 16	*Evaluation Feedback sent to Candidate*	*April 16*

April Session – 2018

	Registration Deadline	***April 1***
Week 1	*Start date*	*April 2*
	Receive Mock Client Interview/Wealth Plan Presentation booking instructions	*April 6*
Week 2	*Deadline to book Mock Client Interview*	*April 13*
Week 3	*Receive Mock Client Interview conference call confirmation*	*April 20*
Weeks 4 – 8	*Conduct Mock Client Interview*	*April 23 – April 27*
	Mock Client Interview synopsis made accessible online	*April 27 – 3:00 pm ET*
	Build your wealth plan	*April 27 – May 27*
Week 9	*Submit wealth plan*	*May 27 – 11:59 pm ET*
Week 11	*Oral presentation*	*June 11 – 15*
Week 16	*Evaluation Feedback sent to Candidate*	*July 16*

Strategic Wealth 360
2018 Schedule

July Session – 2018

	Registration Deadline	***July 1***
Week 1	*Start date*	*July 3*
	Receive Mock Client Interview/Wealth Plan Presentation booking instructions	*July 6*
Week 2	*Deadline to book Mock Client Interview*	*July 13*
Week 3	*Receive Mock Client Interview conference call confirmation*	*July 20*
Weeks 4 – 8	*Conduct Mock Client Interview*	*July 23-27*
	Mock Client Interview synopsis made accessible online	*July 27 – 3:00 pm ET*
	Build your wealth plan	*July 27 – August 26*
Week 9	*Submit wealth plan*	*August 26 – 11:59 pm ET*
Week 11	*Oral presentation*	*September 10 – 14*
Week 16	*Evaluation Feedback sent to Candidate*	*October 15*

October Session – 2018

	Registration Deadline	***October 1***
Week 1	*Start date*	*October 2*
	Receive Mock Client Interview/Wealth Plan Presentation booking instructions	*October 5*
Week 2	*Deadline to book Mock Client Interview*	*October 12*
Week 3	*Receive Mock Client Interview conference call confirmation*	*October 19*
Weeks 4 – 8	*Conduct Mock Client Interview*	*October 22 – 26*
	Mock Client Interview synopsis made accessible online	*October 26 – 3:00 pm ET*
	Build your wealth plan	*October 26 – November 25*
Week 9	*Submit wealth plan*	*November 25 – 11:59 pm ET*
Week 11	*Oral presentation*	*December 10 – 14*
Week 16	*Evaluation Feedback sent to Candidate*	*January 21, 2018*