



Strategic Wealth 360

2018 Schedule

January Session – 2018

	Registration Deadline	January 1
Week 1	Start date	January 2
	Receive Mock Client Interview 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 19-23
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 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 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 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, 2019