CSI

Strategic Wealth 360
2017 Schedule

January Session – 2017

	Registration Deadline	**January 1**
Week 1	*Start date*	*January 3*
	Receive Mock Client Interview instructions	*January 6*
Week 2	*Deadline to book Mock Client Interview*	*January 13*
Week 3	*Receive Mock Client Interview conference call confirmation*	*January 20*
Weeks 4 – 8	*Conduct Mock Client Interview*	*January 23 - 27*
	Mock Client Interview synopsis made accessible online	*January 27 – 3:00 pm ET*
	Build your wealth plan	*January 27 –February 26*
Week 9	*Submit wealth plan*	*February 26 – 11:59 pm ET*
Week 11	*Oral presentation*	*March 13 – 17*
Week 16	*Evaluation Feedback sent to Candidate*	*April 17*

April Session – 2017

	Registration Deadline	**April 1**
Week 1	*Start date*	*April 3*
	Receive Mock Client Interview instructions	*April 7*
Week 2	*Deadline to book Mock Client Interview*	*April 14*
Week 3	*Receive Mock Client Interview conference call confirmation*	*April 21*
Weeks 4 – 8	*Conduct Mock Client Interview*	*April 24 – April 28*
	Mock Client Interview synopsis made accessible online	*April 28 – 3:00 pm ET*
	Build your wealth plan	*April 28 – May 28*
Week 9	*Submit wealth plan*	*May 28 – 11:59 pm ET*
Week 11	*Oral presentation*	*June 12 – 16*
Week 16	*Evaluation Feedback sent to Candidate*	*July 17*

Strategic Wealth 360
2017 Schedule

July Session – 2017

	Registration Deadline	***July 1***
Week 1	*Start date*	*July 4*
	Receive Mock Client Interview instructions	*July 7*
Week 2	*Deadline to book Mock Client Interview*	*July 14*
Week 3	*Receive Mock Client Interview conference call confirmation*	*July 21*
Weeks 4 – 8	*Conduct Mock Client Interview*	*July 24 – 28*
	Mock Client Interview synopsis made accessible online	*July 28 – 3:00 pm ET*
	Build your wealth plan	*July 28 – August 27*
Week 9	*Submit wealth plan*	*August 27 – 11:59 pm ET*
Week 11	*Oral presentation*	*September 11 – 15*
Week 16	*Evaluation Feedback sent to Candidate*	*October 16*

October Session – 2017

	Registration Deadline	***October 1***
Week 1	*Start date*	*October 3*
	Receive Mock Client Interview instructions	*October 6*
Week 2	*Deadline to book Mock Client Interview*	*October 13*
Week 3	*Receive Mock Client Interview conference call confirmation*	*October 20*
Weeks 4 – 8	*Conduct Mock Client Interview*	*October 23 – 27*
	Mock Client Interview synopsis made accessible online	*October 27 – 3:00 pm ET*
	Build your wealth plan	*October 27 – November 26*
Week 9	*Submit wealth plan*	*November 26 – 11:59 pm ET*
Week 11	*Oral presentation*	*December 11 – 15*
Week 16	*Evaluation Feedback sent to Candidate*	*January 15, 2018*