Strategic Wealth 360
2019 Schedule

January Session - 2019

Registration Deadline	***January 1-11:59 PM ET***
Receive Case Study and Instructions for Booking Mock Client Interview, WebEx Test Calls (as required) and Wealth Plan Presentations	January 7
Deadline to book Mock Client Interview, WebEx Test Calls (as required) and Wealth Plan Presentations	January 15
Receive Mock Client Interview, WebEx Test Calls (as required) and Wealth Plan Presentations confirmations	January 25
Conduct Mock Client Interview	January 28 - February 1
Missing Information Synopsis made accessible online	February 1 – 3:00 pm ET
Build Wealth Plan	February 2 – March 3
Submit Wealth Plan	March 3 – 11:59 pm ET
Wealth Plan Presentation	March 18-22
Evaluation Feedback sent to Candidate	*April 19*

April Session - 2019

Registration Deadline	***April 1-11:59 PM ET***
Receive Case Study and Instructions for Booking Mock Client Interview, Wealth Plan Presentations and WebEx Test Calls (as required)	April 8
Receive Mock Client Interview, WebEx Test Calls (as required) and Wealth Plan Presentations confirmations	April 16
Receive Mock Client Interview conference call confirmation	April 26
Conduct Mock Client Interview	April 29-May 3
Missing Information Synopsis made accessible online	May 3-3:00 PM ET
Build Wealth Plan	May 4-June 2
Submit Wealth Plan	June 2-11:59 PM ET
Wealth Plan Presentation	June 17-21
Evaluation Feedback sent to Candidate	*July 19*

July Session - 2019

Registration Deadline	***July 1-11:59 PM ET***
Receive Case Study and Instructions for Booking Mock Client Interview, WebEx Test Calls (as required) and Wealth Plan Presentations	July 9
Deadline to book Mock Client Interview, WebEx Test Calls (as required) and Wealth Plan Presentations	July 16
Receive Mock Client Interview, WebEx Test Calls (as required) and Wealth Plan Presentations confirmations	July 26
Conduct Mock Client Interview	July 29-Aug 2
Missing Information Synopsis made accessible online	August 2-3:00 PM ET
Build Wealth Plan	August 3-September 1
Submit Wealth Plan	September 1-11:59 PM ET
Wealth Plan Presentation	September 16-20
Evaluation Feedback sent to Candidate	*October 18*

October Session - 2019

Registration Deadline	***October 1-11:59 PM ET***
Receive Case Study and Instructions for Booking Mock Client Interview, WebEx Test Calls (as required) and Wealth Plan Presentations	October 7
Deadline to book Mock Client Interview, WebEx Test Calls (as required) and Wealth Plan Presentations	October 18
Receive Mock Client Interview, WebEx Test Calls (as required) and Wealth Plan Presentations confirmations	October 25
Conduct Mock Client Interview	October 28-November 1
Missing Information Synopsis made accessible online	November 1-3:00 PM ET
Build Wealth Plan	November 2-December 1
Submit Wealth Plan	December 1-11:59 PM ET
Wealth Plan Presentation	December 16-20
Evaluation Feedback sent to Candidate	*January 21, 2020*