

2024

# CERTIFIED BUSINESS EXIT CONSULTANT®

TRAINING COURSE

## 2024 TRAINING SCHEDULE



### Table of Contents

About the designation	2
Who should attend	2
What is included	3
CPE Credit	3
IEPA Membership	4
The Program Experience	5
About the IEPA	7
2024 Program Details	8
2024 Calendar	11

## About the designation:

### **CERTIFIED BUSINESS EXIT CONSULTANT® (CBEC®) DESIGNATION PROGRAM**

The CBEC® training is designed to both educate and put advisors in the business of exit planning for privately held business owners. This program utilizes a proprietary, six-step exit planning process that is applicable to any financial analysts advising business owners. This six-step process has stood the test of time, resulting in simplifying a complex process to help advisors more consistently and more effectively communicate with owners on this critical topic of discussion and formal engagement.

Exit planning is a simple concept: it is the idea that a business owner, a few years before they want to sell or transfer their business to someone else, will do some planning around this critically important event. Owners should know and make plans around issues such as:

- The value of their business
- Getting the conversation started and measuring the owner's readiness for an exit
- Who would likely want to own their business
- When they might expect to get paid for the business and whether that is enough money
- Critical issues and strategies to achieve a successful exit

Many of these owners are your existing and valuable customers who are looking to you, as their primary advisor, to assist them with this important need.

As a professional advisor, you are perfectly positioned to deliver these planning-based solutions into your existing and prospective business owner relationships, yielding you a profitable and enjoyable stream of income for your own business or practice.

Adding exit planning to your practice also gives you greater visibility, access to, and standing with a growing network of other professional advisors who are active in the business owner exit planning space. Many of these advisors have owner relationships and want to partner with you to help service the owner's comprehensive needs in the exit planning process.

Fee: \$3,000

## Who should attend:

This program is offered to professionals who help business owners solve problems:

CPA • Valuation Analyst • Exit Planner • CExP • CEPA • CM&AA • Financial Planner • CFO • Attorney

## How You Will Benefit

- Demonstrate an understanding of the "middle marketplace" of business owners at a higher level than 99% of other advisors and consultants
- Describe their value proposition to an owner to assist with their exit planning, as well as position themselves for the execution of that planning
- Integrate and advance the "core" training as they learn the key components of exit planning at a deeper level
- Apply the materials to help assure their success after the course
- Illustrate to business owners exit planning and execution work

## What is included:

Registration for the CBEC® course includes a series of self-paced modules that cover the knowledge essential to competently and confidently lead exit planning engagements. The self-paced modules are accompanied by a series of six live, interactive study group sessions where you get access to exit planning experts and a group of peers, so you can make the leap from theory to execution.

Also included at no additional cost is a complimentary, one-year membership with the International Exit Planning Association (a value of \$2,000) and access to everything you need to successfully launch your exit planning advisory.

\*\* On the anniversary of your enrollment, you will have an opportunity to renew your membership.

### Course Materials:

- *Private Capital Markets: Valuation, Capitalization, and Transfer of Private Business Interests*
- *Middle Market Strategies: How Private Companies Use the Markets to Create Value (select chapters provided with course materials)*
- *Straight Talk About Planning Your Succession*
- *The Right Side of the Table: Where Do You Sit in the Minds of the Affluent?*
- *Valuation for M&A: Building and Measuring Private Company Value*
- *An Introduction to ESOPs*
- *Exiting Your Business, Protecting Your Wealth: A Strategic Guide for Owners and Their Advisors*

### Resources:

- 'How to Write an Exit Plan' course content
- Universal Exit Plan Writing Template
- Unlimited usage of personalized owner engagement survey tools: Business Exit Readiness Index™, Owner Dependence Index™ and Growth Planning Index™
- Monthly member training calls
- Course Library Access
- Referral and Collaboration Portal Access
- 25% Discount to IEPA Annual Conference

### Up to 14 Hours CPE

<b>Delivery Method</b>	Group-Live and Group Internet-Based
<b>Program Level</b>	Advanced
<b>Advanced Preparation</b>	Completion of the IEPA's Exit Planning Essentials Online Training Course (included in course fee)
<b>Prerequisites</b>	Attendees should have completed one of the following: 1) attendance at an IEPA training workshop or 2) completion of the IEPA's Exit Planning Essentials Online Training Course.
<b>Field of Study</b>	Specialized Knowledge
<b>Total CPE Hours</b>	14

The International Exit Planning Association (IEPA) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org).

**Refunds and Cancellations:** Cancellations received in writing two weeks prior to the first day of the training event will be eligible for a refund, less the cost of any course materials not returned to the IEPA. For more information regarding refund, complaint and/or program cancellation policies, please contact our offices at 781-821-2608.

# IEPA Membership Options & Benefits

The International Exit Planning Association (IEPA) promotes exit planning through thought leadership, supports exit planning practitioners, and trains the premier exit planning professionals who are awarded the Certified Business Exit Consultant® designation.

Membership in the IEPA provides access to our network of senior-level, professional advisors through the Referral & Collaboration Portal, our online invitation-only space designed for collaboration.

The IEPA also delivers Continuing Professional Education and Educational Conferences throughout the year. All CBEC® designees must maintain membership in IEPA to sustain their designation and use the CBEC® marks.

There are four types of IEPA Membership, each having progressive levels of access to IEPA licenses, content and tools: Course Subscription, Engagement Tools, Marketing & Practice Management Content, and Executive Study Groups.

WHAT YOU RECEIVE	MEMBERSHIP LEVEL			
	COURSE SUBSCRIPTION	ENGAGEMENT TOOLS	MARKETING & PRACTICE MANAGEMENT CONTENT	EXECUTIVE STUDY GROUPS
Online Course Library <i>(Coming Soon)</i>	YES	YES	YES	YES
Referral & Collaboration Portal	YES	YES	YES	YES
Survey Tools <i>(Licensed Content)</i> <ul style="list-style-type: none"> <li>Business Exit Readiness Index™ (BERI™)</li> <li>Owner Dependence Index™ (ODI™)</li> <li>Growth Planning Index™ (GPI™)</li> </ul>		YES	YES	YES
Universal Exit Plan Template <i>(Licensed Content)</i>		YES	YES	YES
Monthly Member Training Call		YES	YES	YES
Marketing & Practice Management <i>(Licensed Content)</i> <ul style="list-style-type: none"> <li>Center of Influence &amp; Marketing Toolkit</li> <li>White Papers</li> <li>Industry Activity Assessments &amp; Case Studies</li> <li>Appendix of Customizable Exit Plan Content</li> </ul>			YES	YES
<ul style="list-style-type: none"> <li>More than 100 newsletters in these categories: Financial Readiness · General Exit Planning · Growth Internal Transfers · Mental Readiness · Private Capital Markets · Valuation</li> </ul>			YES	YES
ESS Summary Report Access <i>*Fee Based</i>			YES	YES
Back-Office Support for Exit Planning Engagements				YES
Practitioner-Led Peer Community				YES
Registration to all IEPA Conferences	20% Off	25% Off	40% Off	FREE
Annual Dues	\$995	\$2,000	\$3,000	\$6,000

# THE PROGRAM EXPERIENCE

## THE VIRTUAL CBEC® EXECUTIVE STUDY GROUP FOR CANDIDATES:

To support CBEC® candidates in earning the designation (and integrating what they've learned into their practice with confidence), IEPA hosts six CBEC® Executive Study Group sessions (90 minutes each week for six weeks via Zoom).

These game changing sessions are led by John Leonetti, founder of the IEPA, author of *Exiting Your Business, Protecting Your Wealth: A Strategic Guide for Owners and Their Advisors* and creator of the Six-Step Exit Planning Process, and many other active exit planners and industry leaders, who will review the coursework, run drills on sample test questions, give guidance on completing the written exit plan, plus offer "how to" perspective on how to integrate (and commercialize) your exit planning expertise.

## The Twelve Domains of the CBEC Course

- Domain #1: Exit Planning Marketplace, Owner Needs, Advisor Goals and Resources
- Domain #2: The Lower Middle Market / Private Capital Markets
- Domain #3: Understanding, Assessing, and Engaging the Owner
- Domain #4: Readiness of the Owner, Company and Market - Value Gaps
- Domain #5: Understanding the Corporate Entity
- Domain #6: Valuation and the Range of Values
- Domain #7: Business Value Growth Planning and Execution
- Domain #8: Exit Options - External Transfers
- Domain #9: Exit Options - Internal Transfers
- Domain #10: Deal Structuring, Taxes, Legal Agreements, Estate Planning
- Domain #11: The Advisory Team, Finding Exit Collaboration Partners
- Domain #12: Writing and Delivering the Exit Plan

## SIX-WEEK CBEC EXECUTIVE STUDY GROUP AGENDA

Week 1: *"Developing a Capital Markets Perspective"* - How to understand and communicate current private capital market conditions

Week 2: *"Develop an Exit Planning Perspective when Engaging a Business Owner"* - Assessing owner needs and goals, measuring readiness, and identifying any value gap.

Week 3: *"Develop a Perspective on Valuation and Value Growth"* - Understanding and applying valuation concepts including concepts around a business owner increasing the transferable value of the company.

Week 4: *"Develop a Perspective on External Transfers"* - Gaining a comfort level with the business sale process. Applying the external exit option strategies that align with owner goals.

Week 5: *"Develop a Perspective on Internal Transfers"* - Understanding how and where internal transfers are the optimal exit option. How to apply internal exit option strategies that align with owner goals.

Week 6: *"Going to Market, Building Your Advisory Practice"* - Exit Plan Delivery and Execution. Pro tips and best practices, including a practitioner panel discussion and question and answer session.

## HOW TO ACHIEVE THE CBEC® DESIGNATION

The CBEC® Proctored Exam is offered four times a year during the two-day CBEC Executive Bootcamp. Day One is the final CBEC review session and practical approach workshop and Day Two is the CBEC proctored exam administration.

Once the exam requirement is met, the final step to achieving the CBEC designation is submitting a written exit plan that meets the standard of quality expected from all designee holders. To support candidates who are writing an exit plan for the first time (or those who are interested in how others are doing it), you can access the online course, "How to Write an Effective Exit Plan," and use the plan creation tools included in your IEPA licensed membership.

## HOW TO QUALIFY FOR THE CBEC® DESIGNATION:

Below is the checklist of requirements to hold the Certified Business Exit Consultant® (CBEC®) designation:

- ✓ Complete the CBEC® Candidate registration form and pay the registration fee.
- ✓ Gain understanding of the core body of knowledge for exit planning and the Six-Step Exit Planning Process.
- ✓ Pass the CBEC® Proctored Exam.
- ✓ Produce and submit a written exit plan that achieves the CBEC® standard of quality.
- ✓ Maintain membership in good standing and abide by ethical standards of conduct.
- ✓ Attend and attest to a minimum of 10 hours of continuing education every year.
- ✓ Maintain an IEPA membership or pay a designation renewal fee of \$395 annually

## THE CBEC® DIFFERENCE

Advisors choose to achieve the CBEC® designation when they are ready to go beyond education. Due to the experience requirements to hold this standard, those who earn CBEC get to sit at a table among their exit planning practitioner peers (with deep experience, active projects, and growth mindset) and collaborate with like-minded people who are passionate about solving owner problems as they approach a business exit that creates and monetizes their illiquid business wealth.

It takes more than knowledge to earn the Certified Business Exit Consultant® (CBEC®) designation. It is reserved for (and exclusively offered to) those who do exit planning work for business owners versus those who only seek to understand exit planning conceptually. The majority of CBEC® designees have 10+ years of proven experience helping business owners, passed the proctored exam, and submitted a written exit plan within one year of completing the coursework.

## About the IEPA:

The International Exit Planning Association (IEPA) is a practitioner development organization that offers proven resources, topical education, and peer mentorship to exit planning practitioners all over the world. Our founder, John Leonetti, CBEC<sup>®</sup>, managing partner at Beacon Hill Equity Solutions, head faculty at IEPA, author of *Exiting Your Business, Protecting Your Wealth: A Strategic Guide for Owners and Their Advisors*, and creator of the Six-Step Exit Planning Process, has one major mission: help business owners solve problems.

Our programs and services are uniquely positioned to share best practices from active exit planning firms and practitioners from across the industry while focusing on helping advisors who want to go beyond education and implement exit planning into their firms in a way that will transform their business owner clients' lives.

Learning for the sake of learning is good; however, if you are interested in integrating what you've learned to reach new heights as a professional, you have found the right community. We share what we know in abundance (and with the science of how humans learn top of mind) while supporting you in implementation through study groups, mentorship, and ongoing cohort peer groups who are winning exit planning engagements and driving best practices industrywide.

## 2024 Program Details:

### **CBEC®: 2024 SPRING SESSION**

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#### **CBEC EXECUTIVE STUDY GROUP**

- Pre-CBEC Orientation: WED, FEB 14, 2024
- Dates: WED, MAR 6 – WED, APR 17, 2024
- Location: VIDEO CONFERENCE (ZOOM)
- Sessions: WEEKLY; 3:30 P.M. – 5:00 P.M. ET
  - ◀ MAR 6: *"Developing a Capital Markets Perspective"* - How to understand and communicate current private capital market conditions
  - ◀ MAR 13: *"Develop an Exit Planning Perspective when Engaging a Business Owner"* - Assessing owner needs and goals, measuring readiness, and identifying any value gap.
  - ◀ MAR 20: *"Develop a Perspective on Valuation and Value Growth"* - Understanding and applying valuation concepts including concepts around a business owner increasing the transferable value of the company
  - ◀ MAR 27: *"Develop a Perspective on External Transfers"* - Gaining a comfort level with the business sale process. Applying the external exit option strategies that align with owner goals.
  - ◀ APR 10: *"Develop a Perspective on Internal Transfers"* - Understanding how and where internal transfers are the optimal exit option. How to apply internal exit option strategies that align with owner goals.
  - ◀ APR 17: *"Going to Market, Building Your Advisory Practice"* - Exit Plan Delivery and Execution. Pro tips and best practices, including a practitioner panel discussion and question and answer session.

#### **CBEC EXECUTIVE BOOTCAMP**

- Date: Thu, APR 25 – FRI, APR 26, 2024
- Location: Virtual
  - ◀ CBEC Executive Review: THU, APR 25, 2024
  - ◀ CBEC Proctored Exam: FRI, APR 26, 2024

#### **IMPORTANT DATES & DEADLINES:**

- 25% off (Best Rate): EXPIRES DEC 31, 2023
- 15% off (Early Bird): EXPIRES JAN 31, 2024
- Pre-CBEC Orientation: WED, FEB 14, 2024

#### **QUICK INFO & LINKS:**

- How to register: [CBEC: 2024 SPRING SESSION](#)
- Registration Fee: **\$3,000**

2024 Program Details: *(continued)*

## CBEC<sup>®</sup>: 2024 SUMMER SESSION

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### CBEC EXECUTIVE STUDY GROUP

- Pre-CBEC Orientation: WED, MAY 15, 2024
- Dates: WED, JUN 5 – WED, JUL 17, 2024
- Location: VIDEO CONFERENCE (ZOOM)
- Sessions: WEEKLY; 3:30 P.M. – 5:00 P.M. ET
  - ◀ Jun 5: *"Developing a Capital Markets Perspective"* - How to understand and communicate current private capital market conditions
  - ◀ Jun 12: *"Develop an Exit Planning Perspective when Engaging a Business Owner"* - Assessing owner needs and goals, measuring readiness, and identifying any value gap.
  - ◀ Jun 17 (MONDAY): *"Develop a Perspective on Valuation and Value Growth"* - Understanding and applying valuation concepts including concepts around a business owner increasing the transferable value of the company
  - ◀ Jun 26: *"Develop a Perspective on External Transfers"* - Gaining a comfort level with the business sale process. Applying the external exit option strategies that align with owner goals.
  - ◀ **NO CLASS THE WEEK OF JULY 4<sup>TH</sup>**
  - ◀ Jul 10: *"Develop a Perspective on Internal Transfers"* - Understanding how and where internal transfers are the optimal exit option. How to apply internal exit option strategies that align with owner goals.
  - ◀ Jul 17: *"Going to Market, Building Your Advisory Practice"* - Exit Plan Delivery and Execution. Pro tips and best practices, including a practitioner panel discussion and question and answer session.

### CBEC EXECUTIVE BOOTCAMP

- Date: Thu, JUL 25 – FRI, JUL 26, 2024
- Location: Virtual
  - ◀ CBEC Executive Review: THU, JUL 25, 2024
  - ◀ CBEC Proctored Exam: FRI, JUL 26, 2024

### IMPORTANT DATES & DEADLINES:

- **25% off (Best Rate): EXPIRES MAR 31, 2024**
- **15% off (Early Bird): EXPIRES APR 30, 2024**
- **PRE-CBEC ORIENTATION: WED, MAY 15, 2024**

### QUICK INFO & LINKS:

- How to register: [CBEC: 2024 SUMMER SESSION](#)
- Registration Fee: **\$3,000**

## CBEC®: 2024 EARLY FALL SESSION

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### CBEC EXECUTIVE STUDY GROUP

- How to buy: [CBEC: 2024 EARLY FALL SESSION](#)
- Pre-CBEC Orientation: WED, AUG 14, 2024
- Dates: WED, SEP 4 – WED, OCT 9, 2024
- Location: VIDEO CONFERENCE (ZOOM)
- Sessions: WEEKLY; 3:30 P.M. – 5:00 P.M. ET
  - ◀ Sep 4: “Developing a Capital Markets Perspective” - How to understand and communicate current private capital market conditions.
  - ◀ Sep 11: “Develop an Exit Planning Perspective when Engaging a Business Owner” - Assessing owner needs and goals, measuring readiness, and identifying any value gap.
  - ◀ Sep 18: “Develop a Perspective on Valuation and Value Growth” - Understanding and applying valuation concepts including concepts around a business owner increasing the transferable value of the company.
  - ◀ Sep 25: “Develop a Perspective on External Transfers” - Gaining a comfort level with the business sale process. Applying the external exit option strategies that align with owner goals.
  - ◀ Oct 2: “Develop a Perspective on Internal Transfers” - Understanding how and where internal transfers are the optimal exit option. How to apply internal exit option strategies that align with owner goals.
  - ◀ Oct 9: “Going to Market, Building Your Advisory Practice” - Exit Plan Delivery and Execution. Pro tips and best practices, including a practitioner panel discussion and question and answer session.

### CBEC EXECUTIVE BOOTCAMP

- Date: THU, OCT 17 – FRI, OCT 18, 2024
- Location: Virtual
  - ◀ CBEC Executive Review: THU, OCT 17, 2024
  - ◀ CBEC Proctored Exam: FRI, OCT 18, 2024

### IMPORTANT DATES & DEADLINES:

- 25% off (Best Rate): EXPIRES JUN 30, 2024
- 15% off (Early Bird): EXPIRES JUL 31, 2024
- PRE-CBEC ORIENTATION: WED, AUG 14, 2024

### QUICK INFO & LINKS:

- Registration Fee: \$3,000
- How to register: [CBEC® EARLY FALL REGISTRATION](#)

## CBEC®: 2024 LATE FALL SESSION

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### CBEC EXECUTIVE STUDY GROUP

- How to buy: [CBEC: 2024 LATE FALL SESSION](#)
- Pre-CBEC Orientation: TUE, OCT 1, 2024
- Dates: WED, OCT 23, 2024 – WED, NOV 29, 2024
- Location: VIDEO CONFERENCE (ZOOM)
- Sessions: WEEKLY; 3:30 P.M. – 5:00 P.M. ET
  - ◀ OCT 23: *“Developing a Capital Markets Perspective”* - How to understand and communicate current private capital market conditions.
  - ◀ OCT 30: *“Develop an Exit Planning Perspective when Engaging a Business Owner”* - Assessing owner needs and goals, measuring readiness, and identifying any value gap.
  - ◀ Nov 6: *“Develop a Perspective on Valuation and Value Growth”* - Understanding and applying valuation concepts including concepts around a business owner increasing the transferable value of the company.
  - ◀ Nov 13: *“Develop a Perspective on External Transfers”* - Gaining a comfort level with the business sale process. Applying the external exit option strategies that align with owner goals.
  - ◀ Nov 20: *“Develop a Perspective on Internal Transfers”* - Understanding how and where internal transfers are the optimal exit option. How to apply internal exit option strategies that align with owner goals.
  - ◀ Nov 25 (MONDAY): *“Going to Market, Building Your Advisory Practice”* - Exit Plan Delivery and Execution. Pro tips and best practices, including a practitioner panel discussion and question and answer session.

### CBEC EXECUTIVE BOOTCAMP

- Date: THU, DEC 5 – FRI, DEC 6, 2024
- Location: Virtual
  - ◀ CBEC Executive Review: THU, DEC 5, 2024
  - ◀ CBEC Proctored Exam: FRI, DEC 6, 2024

### IMPORTANT DATES & DEADLINES:

- 25% off (Best Rate): EXPIRES AUG 31, 2024
- 15% off (Early Bird): EXPIRES SEP 30, 2024
- Pre-CBEC Orientation: TUE, OCT 1, 2024

### QUICK INFO & LINKS:

- Registration Fee: \$3,000
- How to register: [CBEC® LATE FALL REGISTRATION](#)

# 2024 Certified Business Exit Consultant® Course Calendar

## CBEC 2024 SPRING SESSION

### EXECUTIVE STUDY GROUP

Pre-CBEC Orientation: WED, FEB 14, 2024

Dates: WED, MAR 6 – WED, APR 17, 2024

Location: VIDEO CONFERENCE (ZOOM)

Sessions: WEEKLY; 3:30 P.M. – 5:00 P.M. ET

### EXECUTIVE BOOTCAMP

Review: THU, APR 25, 2024

Proctored Exam: FRI, APR 26, 2024

Location: Virtual

## CBEC®: 2024 EARLY FALL SESSION

### EXECUTIVE STUDY GROUP

Pre-CBEC Orientation: WED, AUG 14, 2024

Dates: WED, SEP 4 – WED, OCT 9, 2024

Location: VIDEO CONFERENCE (ZOOM)

Sessions: WEEKLY; 3:30 P.M. – 5:00 P.M. ET

### EXECUTIVE BOOTCAMP

Review: THU, OCT 17, 2024

Proctored Exam: FRI, OCT 18, 2024

Location: Virtual

## CBEC 2024 SUMMER SESSION

### EXECUTIVE STUDY GROUP

Pre-CBEC Orientation: WED, MAY 15, 2024

Dates: WED, JUN 5 – WED, JUL 17, 2024

Location: VIDEO CONFERENCE (ZOOM)

Sessions: WEEKLY; 3:30 P.M. – 5:00 P.M. ET

### EXECUTIVE BOOTCAMP

Review: Thu, Jul 25, 2024

Proctored Exam: Fri, Jul 26, 2024

Location: Virtual

## CBEC®: 2024 LATE FALL SESSION

### EXECUTIVE STUDY GROUP

Pre-CBEC Orientation: TUE, OCT 1, 2024

Dates: WED, OCT 23, 2024 – WED, NOV 29, 2024

Location: VIDEO CONFERENCE (ZOOM)

Sessions: WEEKLY; 3:30 P.M. – 5:00 P.M. ET

### EXECUTIVE BOOTCAMP

Review: THU, DEC 5, 2024

Proctored Exam: FRI, DEC 6, 2024

Location: Virtual

February '24						
S	M	T	W	T	F	S
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4	5	6	7	8	9	10
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March '24						
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31						

April '24						
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28	29	30				

May '24						
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June '24						
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30						

July '24						
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28	29	30	31			

August '24						
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September '24						
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29	30					

October '24						
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November '24						
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December '24						
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15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

### KEY:

Spring Session
Summer Session
Early Fall Session
Late Fall Session