XCELERATE TRAINING INSTITUTE

your learning & development partner

ACCOUNTING & FINANCE

Skills for Financial Analyst Training Course

DURATION	LANGUAGE	FORMAT
5 days	English	Classroom / Online

Upcoming dates

Dates	Venue	Format	Fee
14 – 18 Jun 2027	Live online	Online (live)	€1,200
19 – 23 Jul 2027	Barcelona	Classroom	€5,500
20 – 24 Dec 2027	Live online	Online (live)	€1,200

Register or ask a question

Online: x8ti.com/course/skills-for-financial-analyst-training-course/

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Skills for Financial Analyst Training Course

Introduction

Effective public sector financial management is crucial for good governance, macroeconomic stability, and efficient use of funds. It involves mobilizing revenue, allocating public funds, and managing public spending to ensure necessary amenities for citizens. Financial analysts play a vital role in financial planning and analysis within both public and commercial organizations. They provide insights into financial health, forecast future revenues and expenditures, and help develop budgets and projections. This Xcelerate course is designed to help individuals become certified financial analysts, equipping them with the skills needed for success in this field.

Learning Objectives

Participants in this course will:

- Understand the effectiveness and importance of financial planning on profitability.
- Learn about various sources of finance and their utilization based on cost of capital.
- Make sound investment decisions through comprehensive appraisals.
- Gain an overview of financial statements and management reports to evaluate performance.
- Recognize concepts of horizontal and vertical analysis.
- Understand how cost behavior affects financial planning.
- Provide analytical results for single business units.
- Identify the best budget type for their organization.
- Reduce the operating cycle by understanding working capital components.
- Manage and control budgets and forward plans effectively.
- Discover the advantages of an efficient ERP system.
- Recognize best practices in financial management.

Training Methodology

Xcelerate’s collaborative Certified Financial Analyst Course includes:

- Lectures
- Seminars & Presentations
- Group Discussions
- Assignments
- Case Studies & Functional Exercises The course follows the ‘Do-Review-Learn-Apply’ model, ensuring an interactive and practical learning experience.

Benefits for Your Organisation

Organizations will benefit from:

- Detailed understanding of the corporate financial planning process.
- Alignment of the planning process with strategic plans and fiscal policies.
- Effective planning of development and capital expenditure with sound assumptions.

- Improved return on investment through comprehensive investment evaluations.
- Accurate calculation of cost of capital and fund requirements.
- Balanced inflow and outflow to maintain strong liquidity.
- Assessment of financial statements and performance tracking.
- Identification of the most suitable budget for the organization.
- Understanding of budget components and the distinction between revenue and capital expenditure.
- Smart budget allocation based on departmental needs.
- Cost-cutting identification and understanding of cost behavior.
- Evaluation of working capital requirements.
- Adoption of best practices in fiscal policies and procedures.

Benefits for You

Participants will gain:

- Knowledge and application of key accounting concepts for financial planning.
- Understanding of capital structure and cost of capital calculation.
- Ability to create sensitivity analyses after investment appraisals.
- Skills to measure net cash flow for projects.
- Capability to formulate an integrated financial model for budget preparation.
- Thorough understanding of cost behavior and variance analysis preparation.
- Distinction between revenue and capital expenditure in strategic planning.
- Insight into working capital needs and optimization.
- Coordination with decision-makers to prepare financial plans under valid assumptions.
- Ability to evaluate financial reports and understand information flow.
- Expertise in reporting ratio analysis to senior management.
- Opportunities for personal development and increased financial attentiveness.

Who Should Attend

This course is ideal for:

- Managing Directors
- Financial Controllers and CFOs
- Members of the Revenue Board
- Internal Auditors
- Senior Executives and Members of Finance Departments
- Professionals aspiring to be Financial Analysts
- Data Analysts
- Risk Officers

Course Outline

Accounting Concepts

- Accounting Conventions
- Accounting Policies
- Revenue Recognition
- International Accounting Standards (IAS)
- International Public Sector Accounting Standards (IPSAS)

Financial Accounts

- Components of Financial Reports
- Balance Sheet
- Profit & Loss Statement
- Statement of Cash Flow
- Statement of Changes in Equity
- Accompanying Notes to the Accounts
- Ratio Analysis
- Vertical and Horizontal Balance Sheet & P&L Statement

Budget Process and Management

- Preparation of Master Budget
- Fixed vs. Flexible Budgets
- Quarterly Reviews
- Forward Planning
- Budget vs. Actual Comparison
- Zero-based Budgets

Sources of Finance

- Equity and Debt Financing
- Revenue Management
- Sources of International Finance
- Gearing Ratios
- Cost of Capital
- Weighted Average Cost of Capital

Development/Capital Expenditure

- Capital Investment Appraisal
- Return on Investment
- Payback Period
- Net Present Value
- Internal Rate of Return
- Public-Private Partnerships

Identifying and Managing Risk and Uncertainties

- Risk Identification
- Risk Rating
- Risk Mitigation
- Risk Monitoring
- Risk Reporting

Cost Accounting

- Total Absorption Costing
- Marginal Costing
- Contribution Margin
- Break-even Analysis
- Sensitivity Analysis
- Variance Analysis (Price, Quantity, Mix Variance)

Enterprise Resource Management (ERP)

- Sales
- Bill of Material
- Material Management
- Procurement
- Production
- Integration with Finance Module

Working Capital Control

- Inventory Control
- Accounts Receivable
- Accounts Payable
- Reconciliation of Sub-ledgers
- Other Current Assets & Current Liabilities
- Tax and Deferred Taxation

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Registration Form

Skills for Financial Analyst Training Course

Preferred dates: ..... Venue or online: .....

Duration: 5 days Language: .....

Please complete and email this form to us, or register online. We confirm your place and send the invoice within one working day.

Delegate information

Full name (Mr / Ms / Dr / Eng): .....

Position: ..... Telephone / mobile: .....

Official email: ..... Personal email: .....

Company information

Company name: .....

Address: .....

City / country: ..... VAT / tax number: .....

Person responsible for training & development

Full name (Mr / Ms / Dr / Eng): .....

Position: ..... Telephone / mobile: .....

Email: .....

Payment

☐ Please invoice me ☐ Please invoice my company

Signature: ..... Date: .....

Call
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Email this form
info@x8ti.com

Register online
Open the course page