Advanced Financial Analysis dan Management

7 - 9 August 2024

Bali

Advanced Financial Modelling – Level 1

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Get prepared for the level 1 of the Advanced Financial Modeller (AFM) certification examination with our detailed online exam prep course. The rigorous course equips you with practical and hands-on experience to design your own financial model. Our course offers a step-by-step and in-depth knowledge on the use of Excel tools and techniques, thereby enabling the participants to gain an understanding on the best financial modelling techniques. The trainees will also gain a thorough understanding for constructing dynamic and interactive financial models, which meet the greatest industry standards.

Overview

The skills related to financial modelling and analysis are the most sought-after skills in the business arena and most desired by employers. The intensive course helps you to effectively prepare for the level 1 of the AFM certification examination.

On completion of the course, you will be able to:

- Gain an understanding about the concepts and methods in financial modelling;
- Improve and upgrade your skills;
- Be a part of a bigger team to offer assistance for improving projects or work on new assignments;
- Significantly use Excel in your routine work, thereby enabling you to make concrete financial decisions.

Who should attend

All individuals who want to improve their financial modeling skills should attend this course

- Middle to senior managers from different industries
- All professionals who want to deal or currently deal with financial modeling in their company
- Consultants, advisors and other professionals who wish to improve their modeling skills

Methodology

The non-theoretical methodology which includes interactive discussions, case studies, and assignments to understand the concepts and their applicability. As a policy, we limit the class size so that we can provide attention to each participant and ensure their objective is achieved. We request you to please bring your laptop with Microsoft Excel installed to the class.

Trainer

All our trainers are carefully chosen by us and possess a rich and vast experience in the financial sector. This course conducted by an experienced training consultant having more than 16 years of industry experience with some of the world's leading business institutions, specializing in corporate finance, investment banking, and private equity.

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About AFM Programme

Candidates who have intentions of earning the AFM certification - level 1 from the Financial Modeling Institute (FMI) should take up this course. The AFM programme is ideal for anyone who has a flair for finance or is working in the field of finance. Both finance students as well as experienced industry professionals can opt for the AFM certification programme.

The FMI examination

FMI provides a global financial modelling certification, which consists of three levels. The structure of the FMI certification is similar to that of the CFA certification scheme. The FMI examination is conducted online twice every year in April and October for which you should register directly with the institute. The duration of the examination is 4 hours. Riverstone Training is one of the few training institutes that are approved by FMI for offering a prep course for the first two levels. For taking up this course, it is not mandatory that you are registered or are appearing for the FMI examination. The course will help you to prepare for the FMI examination; however, attending this course will not guarantee your results in the examination.

Software required

Microsoft Excel is essential for taking up this course. The preferred version is Excel 365; however, the candidates can use any Excel version as per their preference, including a Mac version.

Topics that need to be covered for the level 1 AFM certification

In the 4-hour exam, students should finish a variety of tricky questions from accounting basics, such as:
1. financial statement construction and linkages;
2. financial model layout and best practices;
3. intermediate-to-advanced Microsoft Excel skills/keyboard shortcuts;
4. scenario analysis;
5. model schedules (eg., working capital, fixed vs. variable costs, debt and equity, deferred taxes).

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Course Content

Module – 1
Setting up a financial model and building projections
- Overview of best industry practices for financial modeling
- Steps to create the models as required in exams
- How to create well design model in electronic and printed form
- Steps for creating financial models
- Proper presentation of various sheets and setting up the model input dashboard

Module – 2
Preparation of Income statement, cash flow statements and balance sheet
- Importance of historical information
- Analysis of company and industry information
- Analysis of industry assumptions and their rationale for revenues & costs, assets and liabilities' assumptions - operating cost, capex, leverage, modeling of historical ratios and trends
- Shortlisting assumptions and applying adjustments
- Applying various forecasting tools, etc

Module – 3
Importance of key schedules and their application
- Working capital schedule
- Fixed assets and depreciation
- Schedule of amortization of intangible assets
- Preparation of debt and interest
- Taxation
- Equity fundraising
- Equity gap and funding

Module – 4
How to create working capital schedule
- Components of cash and non-cash working capital
- Working capital ratios and their interpretation
- Forecasting working capital requirements

Module – 5
How to create Capex and funding schedules including multiple debts
- Equity and debt fund raising and repayment structure
- Debt waterfall mechanism and revolver
- Checking debt repayment ratios, leverage, and covenants

Module – 6
Integration of income statement, balance sheet, and cash flow statement
- Industry practices on handling exceptions integration of Cash Flows, Income Statement and Balance Sheet
- How to handle Circular References in financial modeling

Module – 7
Establish scenario and sensitivity analysis
- Use of data for sensitivity analysis
- Identifying suitable scenarios and sensitivities and their impact on financial analysis
- Managing critical pitfalls in the analysis

Module – 8
How to use excel formula and shortcuts
- Key shortcuts and quick usage of excel sheets and formulas

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- Formatting Skills including Custom Formatting
- Lookup Functions
- Absolute References
- Paste Special
- IF Statements
- Conditional Formatting
- Forms and Drop-Down Boxes
- Printing

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DELEGATES' REGISTRATION FORM

Course Fees

	Single	Group**
Normal fees	SGD 1999	SGD 1899
Early bird price*	SGD 1899	SGD 1799

Payment 30 days before commencement of course
**Minimum of 3 participants*

The course fee includes
- Two days of dedicated expert training
- Lunch and refreshments
- Copies of important course material

Venue Details

- All our training sessions are held in good locations, assuring a high level of comfort and a conducive learning environment.
- Due to variation in a number of participants, final venue details will be mailed 14 days before the course commences.
- Registration : 8:30 am
- Session timings: 9:00 am to 5:00 pm
- **Disclaimer:** Riverstone Training reserves the right to change the venue or postpone the course due to unforeseen circumstances.

Company Information

Company Name : _____

Address : _____
_____
_____

Contact person : _____
Designation : _____
Email : _____
Phone : _____

Delegate Information

Name (1) : _____

Designation : _____
Email : _____
Phone : _____

Name (2) : _____
Designation : _____
Email : _____
Phone : _____

Payment Terms

- Full payment is required for seat confirmation.
- Make a crossed cheque or bank draft payable to **Riverstone SG Pte Ltd.**
- Mail your payment with this registration form to **Level 20, Tower 2, One Raffles Place, Singapore 048616.**
- Alternatively, you can do a bank transfer to OCBC Bank account no 686679846001 (Bank no: 7339); Branchno:686; Swiftcode: OCBCSGSG.

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For in-house training on the same course or customized course, please contact us through

Email : register@riverstonetraining.com.sg
or
Phone : +65 9730 4250

Cancellation Policy

- If you are unable to attend, a replacement delegate is always welcome.
- Any cancellation must be made in writing to Riverstone Training at least 14 days before the event date. A full refund, less an administration fee of SGD 150, will be given.
- For written cancellations received less than 14 days before the event date, no refunds will be given. However, you will receive a 100% credit voucher that can be applied towards any of our subsequent training courses within six months of the initial registration.