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PRINCE EDWARD ISLAND

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Continuing Professional Development  
On-Demand Courses with Executive Finance

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**F** | **Executive Finance**



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## Registration Information



Executive Finance is a hands-on, experiential-based thought leadership lab for financial professionals.

Executive Finance curates the best ideas they can find, then tests these ideas with companies to develop tools, methodologies, and executive development courses. Their partners work in finance as executives, corporate directors, educators, speakers, and authors – many times simultaneously, which makes for rich content and stories. In general, Executive Finance’s on-demand courses focus on developing financial professionals to become financial executives; they also offer courses for newer financial professionals in areas such as ethics, financial analysis, and corporate finance.

These on-demand courses by are eligible for verifiable CPD hours, as indicated in the course description. Participants will automatically receive an email notification of completion and can download a course completion certificate.

How to get started:

- Submit your registration form to CPAPEI.
- We will email you a web link where you can access the course.

These titles are available until July 31, 2023.

## 5 Ways COVID-19 Will Forever Change Our Risk Thinking

Price: \$ 55

CPD Hours: 1 hour

Ethics Hours Included: 0 hours

The COVID-19 Pandemic caught many businesses by surprise. We were ill-prepared and left scrambling to adapt our business model, processes, and maintain liquidity to survive. The lessons learned remind us that risk management thinking cannot be forgotten. In this course, you will learn 5 such lessons that you should incorporate into your disaster recovery plans for the next crisis. We may not know for certain when the next crisis will hit us, but we do know for certain it will.

## 6ExY: Mastering the Six Traits of Executive You

Price: \$ 185

CPD Hours: 5 hours

Ethics Hours Included: 0 hours

Few financial professionals even consider the importance of building their executive presence and then they wonder why they don't have a seat or a voice at the executive boardroom table. In this series of 6 modules, you will learn how to elevate your own executive presence and achieve high levels of influence, leadership and make a strategic contribution inside your organization.

## Best Practices for a Quicker Financial Close

Price: \$ 55

CPD Hours: 1 hour

Ethics Hours Included: 0 hours

The pressure on the finance function has never been higher to deliver financial results as soon as possible after the period. Managers, analysts, Boards, and investors are digesting market information in real time and are beginning to expect the same of financial results. To meet these high expectations, the CFO and controller need to find ways to speed up their financial close processes to report the financial results before they become perceived as old news in the new world. In this course, Blair Cook, a many-time CFO, will explore ideas for shortening the financial close process. Leading companies have found ways to close their books in as little as one day and see the benefit of almost real-time analysis (in addition to the actual period financial data) that can be performed with a shorter close.

## Capital Budgeting: Analysis that Improves Long-term ROI

Price: \$ 55

CPD Hours: 1 hour

Ethics Hours Included: 0 hours

This is a course in establishing a capital budgeting process from conducting due diligence through to communicating and facilitating discussions of capital investment opportunities with decision makers. Capital budgeting is a key strategic process that ensures capital is deployed to only those opportunities that have a high probability of meeting or exceeding the expectations for return. It is also a process that ensures that scarce capital resources are deployed to the highest yield opportunities across the organization.

## Change Management: Being A Catalyst CFO

Price: \$ 105

CPD Hours: 1.5 hours

Ethics Hours Included: 0 hours

In this course we are going to look at change from all perspectives. From what sorts of corporate initiatives require careful consideration of change management principles, to the challenges of implementing change. We look at change from the perspective of the employee, after all, it's they for whom we need to change for the organization to be successful. And we develop an approach to enable that to happen successfully. Finally, we will look at way that organizations are adapting to continuous change by changing aspects of their organizational structure.

## Corporate Finance Principles

Price: \$ 105

CPD Hours: 1.5 hours

Ethics Hours Included: 0 hours

This course will takes a practical approach to considering how finance theory is applied in the business world. The course covers many of the key principles that embody corporate finance and gives participants a comprehensive appreciation of the finance discipline. Whether you are aspiring for a career in finance or looking to round out your appreciation of the financial concepts, this course is designed to cover off such topics as financial analysis, forecasting, present value, future value, rate of return, use of debt leverage, and risk management, including derivative instruments.

## ERP - What Every CFO Should Know About Implementing a New ERP

Price: \$ 55

CPD Hours: 1 hour

Ethics Hours Included: 0 hours

In this course, Jennifer Nicholson, a many-time CFO, who has recently gone through implementing a new ERP system shares with you her own insights and experience with the ERP implementation process. Whether you have begun already, are just beginning, or merely contemplating a change to your systems, this course will guide you through all the relevant stages of the implementation process.

## Ethical & Audit Considerations of Cryptocurrency

Price: \$ 105

CPD Hours: 1.5 hours

Ethics Hours Included: 1.5 hours

Cryptocurrencies, such as Bitcoin and Ethereum, are just two of thousands of emerging solutions to create frictionless global transactions between counterparties. Additionally, cryptocurrencies are positioning themselves to become the “new gold” of the modern world as a store of value and immune from geo-political risk. The rise and fall of cryptocurrency prices has not deterred interest in the technology or the space, but is leading to every more practical, accessible and useful applications of blockchain technology. This course uses several case studies to illustrate the audit and ethical considerations in the newly emerging sector. Few accountants and auditors are conversant with cryptocurrency technology and this course is designed to improve your level of awareness and deepen your understanding of issues associated with issuing an audit opinion for clients in this space.

## Financial Analysis: Reading Financial Statements like a Pro

Price: \$ 105

CPD Hours: 1.5 hours

Ethics Hours Included: 0 hours

In this course, we will work through a set of financial statements highlighting the key points of relevance. We will also learn about ratio analysis, which will help us generate a deeper level of insight into the financial results by making comparisons to prior periods and to peers. This is a foundational course that will deepen your understanding of what the numbers mean.

## Financial Intelligence for Entrepreneurs, Executives, and Directors

Price: \$ 185

CPD Hours: 4 hours

Ethics Hours Included: 0 hours

This course is uniquely designed to show you how seasoned executives act and sound like financial experts without dwelling on the details of how one prepares financial reports and analysis. The emphasis of this course is on the users of financial information and serving their needs to make better decisions. In this course, you will learn to look at financial statements through the eyes of a seasoned executive. You will learn how to probe into issues of performance and identify root cause. You will learn to rise above the preparation aspects of accounting and finance that bog down many new financial professionals and scare most non-financial professionals. The insights will help you negotiate your next financing or make your next investment decision. Regardless of whether you have a financial background or not, you will benefit from taking this course to hone your financial intelligence.

## Financial Modeling Using Excel

Price: \$ 105

CPD Hours: 1.5 hours

Ethics Hours Included: 0 hours

In this course we are going learn how to financially model a business using Excel. Financial models underpin strategic and business planning, solicitations for financing, budgeting and forecasting, business valuations, cash budgeting, capital budgeting, and so many other corporate finance purposes. In this course, we are going to concentrate on the preparation of a financial projection of the income statement, balance sheet and statement of cash flow. We will use an approach that keeps model integrity and credibility top of mind throughout development.

## Financing Strategy: Tips for Sourcing Capital

Price: \$ 105

CPD Hours: 1.5 hours

Ethics Hours Included: 0 hours

In this course you are going to learn about the financing strategies for your business throughout its lifecycle. You will learn about all the various debt and equity financing arrangements at an application-based level. In the debt sections of the course, you will learn about how operating lines of credit works and what to watch out for. We will also talk about asset-based lending facilities, term loans, and leasing. Mezzanine financing is an increasingly popular way of replacing equity financing with hybrid financial instruments. In the equity sections of the course, you will learn about venture capital, private equity, and the process of going public. Finally, you will learn about how cost of capital and capital structure factor into your strategic thinking and decision making.

## Fraud in the Workplace

Price: \$ 55

CPD Hours: 1 hour

Ethics Hours Included: 0 hours

In this course we are going to tackle a topic that doesn't factor into many senior financial leader's agendas all that often or until something happens, that is, fraud in the workplace. Occupational fraud is a giant global industry. Organizations are losing an estimated 5% of revenues to employee fraud each year according to the experts at the Association of Certified Fraud Examiners (ACFE). Does that statistic shock you? Are you in disbelief that the number could be so high? In this course, we are going to discuss how employees are doing it, how we can detect it, and most importantly, what can be done to prevent it in the first place. We will use the research of the ACFE to look at the fraud cases under investigation to reach a deeper understanding of this issue. You will be astounded, you may be surprised, but the goal of this course is to make you enlightened.

## Master Capital Allocation

Price: \$ 105

CPD Hours: 1.5 hours

Ethics Hours Included: 0 hours

In this course we are going to tackle capital allocation, that is, how the CEO, and you as CFO and their strategic partner, go about deploying cash inside the business. CEO's are ultimately measured on their record of generating returns for their shareholders. The single most important determinant of shareholder returns is capital allocation. Knowing what tools you have available and when to use them is the key. We'll look how and when you source cash. We'll also look at the strategies behind selecting the most optimal use of that cash, which may include buying back shares in yourself.

## Mastering Your Ethical Intelligence

Price: \$ 185

CPD Hours: 4 hours

Ethics Hours Included: 4 hours

This course is composed of four one modules in ethics. However, unlike most ethics courses, we will not bore you with lectures on what not to do or the rules of professional conduct. This course will raise your awareness of ethical situations that are around you today that you aren't even thinking about. This course will change the way you make decisions and take actions. We will illustrate with numerous case studies that in the absence of ethical intelligence, otherwise good people are highly susceptible to making poor judgments. If that is still not enough to consider this for enrollment, how about this - ethical intelligence has been proven to improve corporate performance! You can get all 4 hours of your Ethics PD requirements in this one course.

## Powerful PowerPoint Presentations

Price: \$ 105

CPD Hours: 1.5 hours

Ethics Hours Included: 0 hours

This is a course about how to use PowerPoint. The course not only covers the features of PowerPoint, but more importantly how to use the features to create presentations that stand apart and engage the audience. In this course we will learn how to use PowerPoint as an effective visual aid to supplement any presentation. We will discuss how PowerPoint can be used to create our own graphics and customize imagery to share our ideas visually with our audience.

## Presentation Skills for Finance Professionals and Executives that Make an Impact

Price: \$ 105

CPD Hours: 1.5 hours

Ethics Hours Included: 0 hours

In this course we are going learn how to deliver an inspired presentation. Finance professionals and executives are being called on more and more to deliver presentations inside and outside the organization. How you deliver these presentations is ultimately a reflection of your executive presence. In this course, you will learn how to plan and organize your presentation; how to tell your message in a way that your audience will remember it and act up on it; and how to deliver your presentation with poise and confidence. Leadership is a key attribute of the modern finance executive and being a successful leader in part hinges on your ability to communicate your ideas in a way that people will follow. This course has been tailor made for you as a financial professional working in today's business world.

## Principles of Ethical Leadership

Price: \$ 185

CPD Hours: 4 hours

Ethics Hours Included: 4 hours

The today world is a mess. The world got this way from a failure of leadership at all levels – from our political leaders to business leaders to leadership in the trenches. But there stand examples of moral leaders who have made a difference, in some cases extraordinary differences. This is a course in leadership – an overlooked style of leadership – ethical leadership. In this course, you will learn the principles of ethical leadership. You will learn first hand how ethical leaders out perform all others by a wide margin by following these principles. You will also learn of the behaviors of amoral leaders, which helps you recognize for yourself when your leadership style may be diminishing your effectiveness.

## Rethinking the Boardroom: Make Your Board a Point of Competitive Advantage

Price: \$ 105

CPD Hours: 1.5 hours

Ethics Hours Included: 0 hours

This course will provide participants with a look behind the boardroom doors to evaluate the effectiveness of corporate governance systems. Today's corporate directors, and the executive teams with whom they work, are being challenged by the owners of the organization more so than ever to not only protect their interests, but also enhance corporate performance. As boards already struggle to balance the growing list of regulatory compliance requirements, we are going to identify and explore three key board leadership roles that differentiate good boards from great ones. We will look at ways the Board can make valuable contributions to value creation and long-term viability by achieving what we will describe during the course as Governance Advantage.

## TGIF: Transform Grow Innovate in Finance

Price: \$ 185

CPD Hours: 4 hours

Ethics Hours Included: 0 hours

This is a course in finance transformation. In fact, it's more than a course, it's a guided journey of self-evaluation, reflection and strategic planning to propel your finance organization forward. Not only are organizations under fire to keep up with internal and external forces that require adaptation and change, so to are the finance functions that support the organization. The modern finance function has never had as great an opportunity as it has today to play a strategic advisory role inside any organization. Yet, most finance leaders and those working in the finance organization find themselves still buried in transactional processing. This course shares with you a path bridging these two states.

## The Credible CFO: Driving Growth & Delivering Predictability

Price: \$ 55

CPD Hours: 1 hours

Ethics Hours Included: 0 hours

In this course, we will look at the credibility of the CFO and of the finance function. We will discuss how we assess credibility as well as the factors that erode and build credibility. Credibility is the foundation for finance's position in supporting a growth mandate. Credible CFO's position themselves as strategic leaders as they master execution of the existing business and develop visibility of future financial results. The ability to deliver predictability helps the executive and the board of directors formulate and execute strategic plans with greater confidence. We will explore strategies that the CFO should be considering to enhance their own credibility as well as that of their team using tools and technology.

## The Future of Finance

Price: \$ 105

CPD Hours: 1.5 hours

Ethics Hours Included: 0 hours

It took a pandemic to uproot those of us working in accounting and finance. In the span of a few years, all of us lived through transforming how and where we worked. That experience positions you well to tackle the future. In this course, you will learn about the future of finance and the challenges that lay ahead. You will peer into the future to answer how, why and where the finance organization will succeed and add value by leveraging people and technology. You will learn about emerging imperatives of sustainability and data as the next frontiers of finance. Finally, you will explore the new skillsets and communication mindset you will need to adopt to ensure stakeholder understand the value proposition offered by the “new” finance function.

## Thinking and Acting Strategically as CFO

Price: \$ 55

CPD Hours: 1 hour

Ethics Hours Included: 0 hours

Are you working in finance and want to play a larger role in the strategy development process of your organization? Perhaps you see an opportunity to formalize strategy development and execution but aren't quite sure how to go about it? This is a course in strategic management. A course that is going to cover all of the important topics of strategic management from developing mission, vision, and values; to conducting situational analysis; to formulating strategy; to executing strategy. The course ties each of the strategic management phases together with facilitation tools and techniques that will allow the learner to make a valuable strategic contribution to their organization.

## Your First 100 Days as CFO

Price: \$ 105

CPD Hours: 1.5 hours

Ethics Hours Included: 0 hours

In this course we are going to look at getting started in a new CFO role. Whether this is your first appointment as CFO or perhaps you are transitioning to a new CFO role at another organization, we will look at different approaches for your first 100 days. We begin with a profile of the modern CFO, that is, what you need to bring to the organization. From there, we will look at team building principles and using proven tools to help you assess the existing finance function against best practices. We will use a strategic approach to developing an overarching mission and value statement for finance to bring context to specific action plans. We will look at structuring the finance function within the organization context to optimize and balance responsiveness to stakeholders with the need for control. Finally, we will look at change management principles to help you initiate your first major project.