



# Corporate Finance Institute e-Learning Courses



CFI is a global provider of online financial training courses with a focus on practical applications. The majority of courses involve hands on Excel tutorials, which take participants beyond the theory to develop job-based skills. All participants are automatically issued certificates of completion after successful finishing each course.

e-Learning Courses  
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Course Dates: All courses are available now, and expire 3 months after registration date.

✓	Course Title	Price	Total
	Math for Corporate Finance	\$ 60	
	Financial Modeling Fundamentals	\$ 180	
	Financial Analysis	\$ 120	
	Building a Financial Model in Excel	\$ 250	
	Business Valuation Modeling	\$ 180	
	Budgeting and Forecasting	\$ 180	
	Rolling 12-month Cash Flow Forecast	\$ 180	
	Behavioural Finance Fundamentals	\$ 90	
	Sensitivity Analysis for Financial Modeling	\$ 90	
	Advanced Excel Formulas	\$ 60	
	Excel Dashboards & Data Visualization	\$ 90	
	Real Estate Financial Modeling	\$ 250	
	Startup / e-Commerce Financial Model	\$ 250	
	Mining Financial Model & Valuation	\$ 250	
	Financial Modeling using VBA	\$ 180	
	Advanced Financial Modeling - Mergers & Acquisitions(M&A)	\$ 250	
	Leveraged Buyout (LBO) Modeling	\$ 250	
	Corporate & Business Strategy	\$ 180	
	PowerPoint & Pitchbooks Presentations	\$ 180	
		Subtotal	
		HST (15%)	_____
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Please return your completed registration form to the CPAPEI Office, via:

Email: info@cpapei.ca Fax: 902.894.4791 Mail: CPAPEI PO Box 301, Charlottetown, PE C1A 7K7

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# Math for Corporate Finance

CPD Hours: 2

This four module course demonstrates how a number of mathematical formulas can be used to conduct detailed analysis on a set of data and/or variables.

## MODULE 1 - DISCOUNTED CASH FLOWS

- ❖ Understand the concept of the time value of money
- ❖ Explain terms such as present value, future value, NPV, DCF, annuities, and perpetuities
- ❖ Use DCF techniques to calculate present values
- ❖ Calculate the present value of cash flow streams such as annuities and perpetuities?

## MODULE 2 - BOND PRICING AND YIELDS

- ❖ Use DCF to find the price of an annual or semi-annual bond
- ❖ Calculate the different yields used to assess bond return
- ❖ Understand the relationship between bond prices and yields
- ❖ Identify whether a bond is trading at par, premium, or discount

## MODULE 3 - KEY STATISTICAL SKILLS

- ❖ Learn to calculate different measures of central tendency including arithmetic mean, weighted mean, WACC, and expected values
- ❖ Calculate simple moving and weighted moving averages
- ❖ Calculate different types of statistical dispersions such as range, variance, and standard deviation

## MODULE 4 - COVARIANCE, CORRELATION & REGRESSION

- ❖ Use correlation and covariance to describe the relationship between two variables
- ❖ Calculate covariance and correlation using Excel
- ❖ Use regression analysis to describe the relationship between two variables
- ❖ Undertake regression analysis in Excel and interpret the results

# Financial Modeling Fundamentals

CPD Hours: 4

This four part series provides tips and tricks for Excel model builders, gives advice on how to audit your financial models, demonstrates how to use better formulas, and shows you how to monitor and handle uncertainty using scenario planning.

## MODULE 1 - EXCEL TIPS AND TRICKS

- ❖ Learn how to speed up your Excel modeling skills by using keystroke navigation
- ❖ Significantly improve how you can edit your worksheet by learning how to use editing shortcuts in Excel
- ❖ Develop the skill every model builder needs in editing and modeling your spreadsheet in mere minutes

## MODULE 2 - BETTER FORMULAS

- ❖ Build flexibility into financial forecasts
- ❖ Break down complex calculations
- ❖ Minimize errors in Excel models
- ❖ Understand Excel function syntax performance?

## MODULE 3 - CATERING FOR UNCERTAINTY

- ❖ Learn how to perform sensitivity analysis
- ❖ Understand how data tables and goal seek can facilitate your model building process
- ❖ Learn how to measure the impact of future uncertainty on cash flows and profit with scenario planning
- ❖ Learn how to use scenario and solver tools to see how certain inputs can impact your model

## MODULE 4 - AUDITING A MODEL

- ❖ Learn how to quickly and easily find errors and audit a spreadsheet
- ❖ Understand how the auditing tool-bar can help make your spreadsheet error-free
- ❖ Learn how to use test data to uncover errors

# Financial Analysis

CPD Hours: 4

This four module course demonstrates how you can perform a financial analysis on any organization using a wide variety ratios derived from its financial statements.

## MODULE 1 - ANALYZING THE INCOME STATEMENT

- ❖ Review the various components of the income statement
- ❖ Conduct a comprehensive vertical and horizontal analysis of the income statement
- ❖ Benchmark income statement performance against an appropriate peer group

## MODULE 2 - ANALYZING THE BALANCE SHEET

- ❖ Breakdown and define each component of the balance sheet
- ❖ Explain overall efficiency ratios: Total asset turnover and net asset turnover ratio
- ❖ Explain working capital efficiency ratios: Inventory, accounts receivable, and accounts payable
- ❖ Determine how to reduce the working capital funding gap to improve operational efficiencies
- ❖ Undertake trend analysis to determine the overall financial performance of a company and forecast future performance

## MODULE 3 - FUNDING THE BUSINESS

- ❖ Breakdown and understand each component of the cash flow statement
- ❖ Understand different types of debt financing tools (e.g. bonds, syndicated loans, and leasing), equity (e.g. common shares and preferred shares), and leverage ratios (e.g. debt to tangible net worth, and total assets to equity)
- ❖ Use real-life cash flow statements to assess the operations of a company?

## MODULE 4 - PYRAMID OF RATIOS

- ❖ Unlock the drivers of the return on equity ratio
- ❖ Analyze the profitability, efficiency, and leverage ratios that make up the pyramid of ratios
- ❖ Understand the links between the pyramid's primary, secondary, and tertiary ratios
- ❖ Construct a pyramid of ratios using a set of published financial statements and perform a complete financial analysis

# Building a Financial Model in Excel

CPD Hours: 4

This four part series guides you through how to apply a structured approach to financial modeling in Excel. It covers the many hallmarks that make financial models robust; demonstrates best practice techniques in planning model structure; and explains how to forecast the income statement from operating revenues down to operating profit.

## MODULE 1 - A STRUCTURED APPROACH TO FINANCIAL MODELING

- ❖ Learn how to apply a structured approach to financial modeling in Excel
- ❖ Understand the many hallmarks that make financial models robust
- ❖ Use best practice techniques in planning your model structure
- ❖ Learn how to forecast the income statement from operating revenues down to operating profit

## MODULE 2 - FORECASTING INCOME STATEMENT AND BALANCE SHEET ITEMS

- ❖ Use different approaches to properly forecast operating assets
- ❖ Learn how to forecast property, plant, equipment, and other operating assets
- ❖ Learn how to forecast various components of working capital including accounts receivable, inventories, and accounts payable

## MODULE 3 - DEBT AND FINANCING SCHEDULES

- ❖ Learn how to forecast debt financing and related interest costs
- ❖ Learn how to forecast equity financing and dividends
- ❖ Use Excel to solve circular references using both iterative and analytic approaches

## MODULE 4 - BUILDING A FREE CASH FLOW FORECAST

- ❖ Understand the importance of incorporating error checks in your financial models
- ❖ Learn how to derive a forecast cash flow statement based on a forecast income statement and balance sheet
- ❖ Derive a free cash flow statement that can be used for equity valuation

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# Business Valuation Modeling

CPD Hours: 4

This four part course provides participants with the skills needed to do a basic business valuation.

## MODULE 1 - VALUATION USING EQUITY MULTIPLES

- ❖ Calculate and analyze valuation using equity multiples
- ❖ Appreciate the drivers of equity multiples?
- ❖ Value a company using equity multiples from comparable public companies and precedent transactions

## MODULE 2 - VALUATION USING ENTERPRISE VALUE MULTIPLES

- ❖ Calculate various enterprise value multiples
- ❖ Understand the drivers of enterprise value multiples
- ❖ Value a business using enterprise value multiples

## MODULE 3 - VALUING A BUSINESS USING DISCOUNTED CASH FLOWS

- ❖ Value a business using a two stage DCF valuation model
- ❖ Calculate free cash flows to the firm and to equity
- ❖ Outline the main drivers of free cash flows
- ❖ Identify what DCF discount rate to use

## MODULE 4 - DETERMINING THE COST OF CAPITAL

- ❖ Calculate the cost of equity funding
- ❖ Calculate the cost of debt funding
- ❖ Calculate an organization's weighted average cost of capital (WACC)



# Budgeting and Forecasting

CPD Hours: 4

Build and develop budgets, forecast results, and use variance analysis to track performance. This interactive and applied course enables participants to:

- ❖ Adopt a disciplined approach to developing budgets
- ❖ Forecast results with quantitative and qualitative methods
- ❖ Effectively use variance analysis to track performance
- ❖ Present results with charts and graphs

## WHO WILL BENEFIT

Those who are responsible for financial management, budgeting, and forecasting within their organizations.

## KEY LEARNING OBJECTIVES

- ❖ Understand the principles behind best practice financial management
- ❖ Explain the importance of budgeting within a strategic framework
- ❖ Build a robust budgeting process within their organization
- ❖ Know when and where to use various budgeting approaches such as zero-based budgeting
- ❖ Forecast future performance by better analyzing revenue and cost drivers
- ❖ Use effective variance reporting to track organizational performance
- ❖ Make use of Excel functions and tools that are particularly suited to the budgeting process.

## COURSE CONTENT

- ❖ Budgeting within a strategic framework
- ❖ Building a robust budgeting process
- ❖ Managing budget psychology
- ❖ A practical guide to developing budgets
- ❖ Common budgeting approaches (e.g. Incremental, value based, zero based, etc.)
- ❖ Forecasting techniques (moving average, regression analysis, etc.)
- ❖ Tracking budget performance with variance analysis (waterfall charts, etc.)
- ❖ Applied budgeting tools and techniques (Excel, solver, pivot tables, etc.)

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# Rolling 12-month Cash Flow Forecast

CPD Hours: 4

Master the art of building a rolling 12-month cash flow forecast model in our Financial Planning & Analysis (FP&A) course. In this course you will learn to build a cash flow model from scratch complete with assumptions, financials, supporting schedules and charts.

We will look at how to forecast revenues, operating expenses and changes in balance sheet items to arrive at monthly cash flow. From there we will assess the financial impact on the business, decide if capital needs to be raised, evaluate credit metrics, and create elegant charts to inform management.

## KEY LEARNING OBJECTIVES

- ❖ Apply a structured approach to monthly cash flow modeling in Excel
- ❖ Build up the assumptions and formulas required to forecast the business
- ❖ Understand how to forecast the financial statements based on the business plan
- ❖ Calculate the monthly cash flow
- ❖ Analyze the impact of the forecast on the company's balance sheet and capitalization
- ❖ Output relevant graphs to illustrate the cash flow profile to management

# Behavioural Finance Fundamentals

CPD Hours: 2

Behavioural finance is the study of the influence of psychology on the behaviour of financial practitioners. In this three part course, you will learn about the wide range of decision making biases and information processing errors that influence our financial decision making.

## MODULE 1 - DECISION MAKING BIASES AND ERRORS

- ❖ Overview of decision making biases and errors
- ❖ Reflective versus reflexive decision making
- ❖ The impact of overconfidence and optimism on decision making

## MODULE 2 - INFORMATION PROCESSING ERRORS

- ❖ Self-attribution and hindsight biases
- ❖ Confirmation and representative biases
- ❖ Guarding against the narrative fallacy

## MODULE 3 - HOW DECISIONS ARE IMPACTED BY OTHERS

- ❖ Anchoring bias
- ❖ Loss aversion
- ❖ Herding versus independent thinking

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# Sensitivity Analysis for Financial Modeling

CPD Hours: 2

This single module advanced financial modeling course takes a deep dive into sensitivity analysis. By the end of this course you will have a through grasp of how to build a robust sensitivity analysis system into your financial model. Form and function are both critical to ensure you can handle quick changes and information requests when you're working on a live transaction.

## KEY LEARNING OBJECTIVES

- ❖ The importance of sensitivity analysis
- ❖ Model integration - Direct and Indirect methods
- ❖ Analyzing results
- ❖ Preparing a gravity sort table
- ❖ Using tornado charts
- ❖ Presenting results

# Advanced Excel Formulas

CPD Hours: 2

Learn the most advanced formulas, functions and types of financial analysis to be an Excel power user. This course builds on our free Excel Crash Course and is designed specifically for spreadsheet users who are already proficient and looking to take their skills to an advanced level.

This advanced tutorial will help you become a world class financial analyst for careers in investment banking, private equity, corporate development, equity research and FP&A.

## OVERVIEW

This advanced Excel training course starts with a blank spreadsheet and quickly dives into using combinations of functions and formulas to perform dynamic analysis.

## THE MAIN FORMULAS AND FUNCTIONS COVERED IN THIS COURSE

- ❖ INDEX and MATCH
- ❖ IF with AND / OR
- ❖ OFFSET combined with other functions
- ❖ CHOOSE for creating scenarios
- ❖ INDIRECT combined with other functions
- ❖ XNPV and XIRR
- ❖ CELL, COUNTA and MID functions combined together
- ❖ PMT, IPMT and principal payment calculations

## THE MAIN TYPES OF DATA ANALYSIS IN THIS TUTORIAL INCLUDE

- ❖ Data tables
- ❖ Pivot tables
- ❖ Column and line charts
- ❖ Stacked column charts
- ❖ Waterfall charts
- ❖ Gauge charts

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# Excel Dashboards & Data Visualization

CPD Hours: 2

This in-depth course will teach you how to build a custom Excel dashboard using professional data visualization techniques. By the end of the course you will have a solid understanding of how to tell a story by combining data, charts, graphs, and other visuals.

## WHO WILL BENEFIT

This Excel dashboards course should be taken by any type of financial analyst working in corporate finance. This includes financial planning & analysis (FP&A), corporate development, equity research, and investment banking.

## KEY LEARNING OBJECTIVES

This course will teach you all about the most important data visualization techniques, including:

- ❖ How to focus attention
- ❖ How to use white space effectively
- ❖ Storytelling with data
- ❖ Narrative techniques
- ❖ A variety of visuals
- ❖ How to use affordances
- ❖ Storyboarding

Additionally, this online course will teach you how to create a dashboard in Excel from scratch. The main dashboard topics covered in this class include:

- ❖ Page layout and design
- ❖ Line charts
- ❖ Area charts
- ❖ Column and bar charts
- ❖ Gauge charts
- ❖ Formatting and design

# Real Estate Financial Modeling

CPD Hours: 4

Build a dynamic Real Estate Financial Model to evaluate the investment return profile of a development project in Excel.

This financial modeling real estate excel course is designed for development professionals, lending / banking analysts, surveyors, and anyone interested in mastering the art of building a real estate development models from scratch.

In this real estate modeling course, you will learn step-by-step how to build a dynamic a financial model that incorporates sensitivity analysis of development costs, sales prices, and other aspects of development.

## WHO WILL BENEFIT

This real estate development financial modeling in Excel course is designed for anyone who is seeking to develop intermediate to advanced financial modeling skills and become an expert financial modeling for real estate development.

## KEY LEARNING OBJECTIVES

- ❖ Real estate industry Overview
- ❖ Calculate Cap Rate and Net Operating Income (NOI)
- ❖ Build an interactive financial model to assess a project's financial viability
- ❖ Understand how to project real estate financing (both debt and equity) flow in and out depending on stage of development
- ❖ Design and structure of an Excel-based project finance model
- ❖ Modeling cash flows for a real estate development project
- ❖ Build in "triggers" and sensitivities to understand a project's exposure to key drivers
- ❖ Build in ownership and financial structures (debt & equity)
- ❖ Calculate Internal Rate of Return (IRR), Return on Sales, Return on Cost
- ❖ Produce a one-page investment summary memo

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# Startup/eCommerce Financial Model & Valuation

CPD Hours: 4

In this one part module, you will master the art of building a financial model and valuing an eCommerce Startup. In this course you will learn to build a startup financial model from scratch complete with assumptions, financials, valuation, and output charts. We will look at how much money this business has to raise based on its business plan and model out each year of cash flow.

## KEY LEARNING OBJECTIVES

- ❖ Understand key Startup / eCommerce terms and definitions
- ❖ Understand the eCommerce industry
- ❖ Input key assumptions into a financial model
- ❖ Calculate an order buildup and customer base schedule
- ❖ Build financial statements based on the business plan
- ❖ Perform a DCF valuation of the startup / eCommerce business
- ❖ Output relevant graphs to illustrate the investment opportunity



# Mining Financial Model & Valuation

CPD Hours: 4

In this one part module, you will master the art of building a financial model and valuing an eCommerce Startup. In this course you will learn to build a startup financial model from scratch complete with assumptions, financials, valuation, and output charts. We will look at how much money this business has to raise based on its business plan and model out each year of cash flow.

## KEY LEARNING OBJECTIVES

- ❖ Understand key Startup / eCommerce terms and definitions
- ❖ Understand the eCommerce industry
- ❖ Input key assumptions into a financial model
- ❖ Calculate an order buildup and customer base schedule
- ❖ Build financial statements based on the business plan
- ❖ Perform a DCF valuation of the startup / eCommerce business
- ❖ Output relevant graphs to illustrate the investment opportunity

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# Financial Modeling using VBA

CPD Hours: 2

This four part course provides participants with the skills needed to incorporate Visual Basic for Applications (VBA) into financial models. This VBA module series will be particularly valuable to those who regularly build financial models in Excel and are looking for a thorough introduction to VBA.

## MODULE 1 - INTRODUCTION TO VBA FOR FINANCIAL MODELING IN EXCEL

- ❖ Explain the benefits of VBA in financial models
- ❖ Navigate around the VBE window
- ❖ Record macros using absolute and relative referencing

## MODULE 2 - DESIGN, BUILD AND RUN VBA SUB PROCEDURES

- ❖ Write VBA code for a sub procedure
- ❖ Differentiate between VBA objects, properties and methods
- ❖ Understand why and how to declare variables
- ❖ Call sub procedures when needed

## MODULE 3 - CREATE CUSTOMIZED EXCEL FUNCTIONS

- ❖ Utilize unique VBA functions
- ❖ Incorporate Excel functions into VBA code
- ❖ Create customized functions using VBA code

## MODULE 4 - BRANCHING, LOOPING AND PROCEDURE CODE

- ❖ Create event handling procedures Use "On Error" statements
- ❖ Create branching code using "If...Then" statements
- ❖ Create looping code using "For...Next" and "Do...Loop" statements

# Advanced Financial Modeling – Mergers & Acquisitions (M&A)

CPD Hours: 5

This advanced financial modeling course on mergers and acquisitions is designed for professionals working in investment banking, corporate development, private equity, and other areas of corporate finance that deal with analyzing M&A transactions.

## M&A MODELING COURSE OBJECTIVES

- ❖ Learn how to structure an M&A model in the most efficient way
- ❖ Set up all the assumptions and drivers required to build out the M&A model
- ❖ Calculate all the necessary adjusting entries required to create a post-transaction balance sheet
- ❖ Integrate the acquirer and the target into a pro form model
- ❖ Calculate the accretion or dilution of key per share metrics post-transaction
- ❖ Perform sensitivity analysis on key assumptions and assess the overall impact of the transaction

## MERGERS AND ACQUISITIONS COURSE CASE STUDY

This course is built on a case study of Online Company Inc acquiring Brick 'n' Mortar Co. Through the course of the transaction, students will learn about:

- ❖ The construction of a detailed Pro Forma model
- ❖ Analysis of synergies, revenue enhancements, cost structures
- ❖ Integration considerations
- ❖ Accretion / dilution analysis
- ❖ Deal terms and structuring
- ❖ The strategic impact of combining the businesses
- ❖ Share price impact

# Leveraged Buyout (LBO) Modeling

CPD Hours: 5

Learn to build an LBO model from scratch in CFI's leveraged buyout modeling course. This advanced class covers how to set up and build an LBO model step-by-step including assumptions, financing, forecast income statement, balance sheet, cash flow, debt schedule, DCF, IRR, sensitivity analysis, error checks, all formulas, functions, and formatting.

## LEARNING OBJECTIVES

- ❖ Layout and structure - how to effectively set up the model in Excel
- ❖ Assumptions - general transaction details, operating scenarios, financing terms, sources and uses of cash, etc.
- ❖ Historical financial statements - linking the 3 statements in Excel
- ❖ Building the forecast- using operating scenarios and other assumptions to drive the forecast
- ❖ Transaction balance sheet - calculating all adjusting entries to create a pro forma balance sheet (goodwill, recapitalization, etc)
- ❖ Debt schedule - model all tranches of debt and interest using dynamic formulas
- ❖ Credit metrics - model all necessary debt covenants such as debt/EBITDA, EBIT/Interest, fixed-charge coverage ratio, and more
- ❖ DCF & IRR- incorporate a discounted cash flow (DCF) analysis and internal rate of return (IRR) by investor type
- ❖ Sensitivity analysis - create data tables to sensitize the IRR based on changes in key assumptions and drivers
- ❖ Charts & graphs - show outputs and results from the LBO model

## WHO WILL BENEFIT

This LBO model course is designed for advanced financial practitioners. It is most suitable for professionals working in investment banking and private equity, although it may also be useful for professionals in equity research, corporate development, and other areas of finance.

# Corporate & Business Strategy

CPD Hours: 3

Strategy matters to all operating companies, as it is a major determinant of the success of their business. This Corporate & Business Strategy course will cover the most important terminologies, theories, concepts, and frameworks on strategy. The course is designed to guide you through a comprehensive strategic analysis process, and demonstrate the application of theories into real-world business situations.

## LEARNING OBJECTIVES

By completing this strategy course, you'll be able to:

- ❖ Understand how the strategic analysis process helps decision makers perform in-depth analyses and identify optimal strategic alternatives
- ❖ Differentiate between the three levels of strategy (corporate, business, and functional)
- ❖ Perform external analysis by looking at the supply chain, mapping out strategic groups, building competitive forces model and analyzing PEST factors
- ❖ Perform internal analysis by understanding a company's core competencies, competitive advantage, value chain activities and ways to sustain competitive advantages
- ❖ Assess a company's current corporate-level, business-level and functional-level strategies
- ❖ Learn how to generate, evaluate and select optimal strategic alternatives through methods such as SWOT analysis, DCF analysis and multi-criteria analysis
- ❖ Tie strategic alternatives to a company's mission, vision and goals
- ❖ Apply all theories taught in the lectures into a case study and generate the appropriate strategies using the provided information

## WHO WILL BENEFIT

This strategy course is designed specifically for financial analysts. Professionals who will get the most value from this class include investment banking, equity research, corporate development, equity research, and private equity.

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# PowerPoint & Pitchbooks Presentations

CPD Hours: 4

## OVERVIEW

Learn the most advanced functions, tips and best practices for presentation design to be a distinguished PowerPoint user. This tutorial is designed specifically for financial analysts who need to create PowerPoint presentations, mainly in the form of pitchbooks. This is a classic skillset for Analysts who need to make world-class presentations.

This advanced PowerPoint tutorial will help you become a world-class financial analyst for careers in investment banking, private equity, corporate development, equity research and FP&A. By watching the instructor build the pitchbook right on your screen, you can easily pause, rewatch, and repeat exercises until you've mastered them.

This Investment Banking PowerPoint crash course starts with a classic example of a "bad" presentation and quickly dives into using PowerPoint functions to improve the presentation to systematically make it "good".

This course focuses on two types of presentations: distributed presentations where the presentation is printed or distributed electronically, and live presentations where there is a speech accompanying the presentation.

## Recommended Prerequisites

You are expected to have either completed the stated prerequisite course(s) or possess the equivalent knowledge prior to enrolling in this course:

- ❖ Building a Financial Model in Excel
- ❖ Business Valuation Modeling

