

Fundamentals of Financial Modeling

Overview

This intensive half-day workshop, an abbreviated version of the program for Training The Street's corporate clients, is designed to develop financial modeling skills through actual hands-on construction of an abridged financial model. The completed product is a model with 5 years of projections and 3 years of historical data.

In addition, the workshop will cover the following modeling topics:

- Excel best practices, common "shortcut" keys and other efficiency tips
- Fundamentals of creating data tables

Learning Methodology

The lectures will discuss theories, approaches and applications of financial modeling. The participants will have the opportunity to construct a model of their own to apply the lessons learned in the lectures.

Personal one-on-one assistance will be available to answer questions and give guidance while the participants are working on the computers. During computer time, Training The Street will supplement the lectures with tips and hints on Excel best practices for financial modeling.

Target Audience

This intensive workshop will benefit any professional who will be required to create financial projections, especially for students interested in:

- Working in the financial services industry (investment banking, consulting, research, asset management, private equity, brokerage, sales & trading, insurance, etc.)
- Working in the corporate or strategic development group or finance department of a corporation
- Enhancing the learning experience in finance and financial statement analysis classes
- Working in marketing, brand management or operations for a corporation and being responsible for a product or divisional budget, projections and profit/loss statement

Participants should have a basic understanding of finance, accounting and financial statement analysis. A proficiency of Excel is recommended to gain the most from the experience. Much of the instruction will be Excel tips and shortcuts to improve spreadsheet navigation speed, abilities and efficiencies.