Financial Modelling & Dashboard Excel Workshops

Take your modelling, analysis and data visualisation skills to the next level with author and modelling specialist **Danielle Stein Fairhurst**

Being able to accurately model and forecast the volatile economic inputs and then interpret and communicate the results is one of the most highly sought-after skills for business professionals today. Build on your existing modelling skills and apply new techniques to better analyse financial data, predict revenues and cost and assess risks to justify business decision in the most time-efficient and effective way.
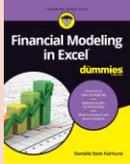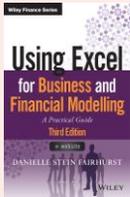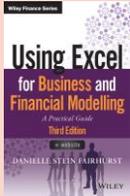
Learn Financial Modelling Today.

March & April 2020

Sydney

Brisbane

Melbourne

www.plumsolutions.com.au/schedule

Course Summary

plumsolutions
Specialists in Financial Modelling

One Day Course	Book included	Suitable for	Covered	Practical Modeling	Online	Public Workshop	In-house
Financial Modelling for Non-Financial Modellers LEVEL: Basic	*Financial Modeling in Excel for Dummies*	Those new to Financial Modelling concepts, and/or with basic Excel skills.	Introduces the fundamentals and concepts of building a financial model using Excel. This is a foundation builder for the other courses.	Build a cashflow for a café business with input, expense assumption and scenarios. SOFTWARE: Excel (any version)	✓	✗	✓
Financial Modelling in Excel LEVEL: Intermediate	*Using Excel for Business and Financial Modelling*	Competent Excel users who need to explore the practical usage of Financial Modelling best practices in a model.	By creating your own user-friendly financial model, learn to translate business concepts into a structured format to identify weaknesses and predict future performance.	Assess the feasibility of a new product project evaluation tools NPV, IRR and payback period in a business case scenario model. SOFTWARE: Excel (any version)	✓	✓	✓
Advanced Financial Modelling in Excel LEVEL: Advanced	*Using Excel for Business and Financial Modelling*	Competent modellers who have either completed the Intermediate course or are already experienced modellers.	Following on from the intermediate course, we build a more detailed model, covering more advanced technical methods.	Build a funding model including 3-way model with scenario analysis. Includes practical real-world advanced techniques. SOFTWARE: Excel (any version)	✓	✓	✓
FMI Advanced Financial Modeller Exam Prep LEVEL: Intermediate	n/a	Candidates planning to sit the Level 1 AFM Certification from the Financial Modeling Institute (FMI).	Covers the practical knowledge and skill of building the financial statements to help with exam preparation.	Build a 3-way model. Focusses less on advanced techniques and more on structure, layout, speed and accuracy. SOFTWARE: Excel (any version)	✗	✗	✓
Dashboard Reporting in Modern Excel LEVEL: Intermediate	n/a	Finance and non-finance staff who need to create dashboards and reports	Learn to analyse, interpret & present information. 'Tame' your data and make it work for you.	Build beautiful, interactive dashboards in Excel and Power BI SOFTWARE: Excel 365, Power Query & Power BI	✗	✓	✓

Public Course Information

Public workshops run from 9am until 5pm as a one-day public workshop in CBD locations, or in-house at your company.

- 10 Barrack St, Sydney
- 300 Adelaide St, Brisbane
- 500 Collins St, Melbourne

Got a few participants? Run this course in-house!

Public Course Schedule

Financial Modelling in Excel

- Sydney   Thurs 12th March
- Brisbane   Tues 24th March
- Melbourne   Tues 31st March

Public courses are run in a computer laboratory with workstations provided. Participants may bring their own laptops if they prefer. The course is demonstrated using Microsoft Excel 365, but participants can use their preferred version of Excel.

Advanced Financial Modelling in Excel

- Sydney   Fri 13th March
- Brisbane   Wed 25th March
- Melbourne   Wed 1st April

Course materials contain instructions for different versions, including Excel for Mac. Each participant receives a USB loaded with examples and templates.

Dashboard Reporting in Modern Excel

- Sydney   Wed 11th March
- Brisbane   Thurs 26th March
- Melbourne   Thurs 2nd April

At each step during the course, participants build and practice each formula, tool and technique and will build their own dashboards or financial models to take away for future use.
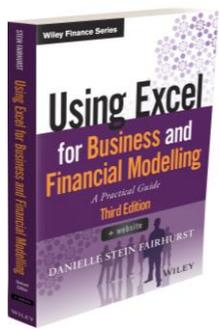
Course fees are $990 incl GST per day
Book and pay four weeks in advance to get $100 off
Book two workshops + one online course for $1,800 incl GST
Bulk discounts apply for multiple registrations
Bookings may be cancelled or rescheduled up to two weeks prior to workshop date without penalty

Financial Modelling workshops include a copy of **'Using Excel for Business and Financial Modelling'** *(Third edition)* published by Wiley Finance and written by your instructor, **Danielle Stein Fairhurst,**

"Highly knowledgeable! It was great that we were given guidance on what the dos and don'ts are. Too often we look at data/graphs that don't tell the story!
Finance Manager, MYOB

These courses build on students' **existing knowledge** of Excel tools and functions and incorporates these into complex and dynamic financial models and dashboards.

"The Financial Modelling course was excellent. Danielle is obviously an expert in her field and knew exactly how to structure the course. Highly recommended for anyone who wants to take their modelling skills to the next level."
Head of Finance, Man Group Australia

What past students say :
"This was a jam-packed course with practical content and very well-presented."

Learn Financial Modelling Today.

Meet your facilitator, financial modelling and analysis in Excel specialist,

Danielle Stein Fairhurst

Principal Consultant, Plum Solutions
AFM(FMI), MBA, CDAF ACCA, BaIBR

- Financial Modelling Institute (FMI) Approved Training Provided and Advisory Board Member
- Judging panel member for the 2020 Financial Modelling Innovation Awards
- Diversity Council Member for the ModelOff Financial Modeling World Championships

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