

Certified Transformative Advisor Program

Financial Advisory Certification

Syllabus

- I. Section One - Resetting the conversation by understanding the business environment - the OLD Accounting Process vs. the New Analysis Process.
 - Module 1 - Financial Advisory - The Small Business Owner
 - Module 2 - The Profitability Environment
 - Module 3 - The Small Business Process
 - Module 4 - Business Life Cycles and Why They Matter
 - Module 5 - Planning for Thresholds
 - Module 6 - Key Skills Required

- II. Section Two - The Analytical Process - The What, How and Why of Financial Analysis. Why do things look the way they do and what does it tell us about the company's performance?
 - Module 7 - Cost Accounting, Operating Expenses & Staff Efficiency
 - Module 8 - Detailed Review of Metrics and Ratios
 - Module 9 - Technical (Quantitative) vs. Practical (Qualitative) Analysis
 - Module 10 - Detailed Review of Various Forecasting Approaches to Achieve Specific Results
 - Module 11 - The Details of Cash Flow Forecasting

- III. Section Three - The Reporting Process - The Interpretation, Communication and Implementation of Operational Intelligence to improve results.
 - Module 12 - A Detailed Discussion of the Client Coaching Conversation
 - Module 13 - Using Variance Analysis and Common Size Reports
 - Module 14 - Building Revenue Forecasts
 - Module 15 - Building Expense Forecast Elements
 - Module 16 - Steps in the Review and Advisory Cycle
 - Module 17 - Understanding How to Drive Value (Overview of valuations)
 - Module 18 - Putting it all Together

2021 Financial Advisory (CTAF)

Cohorts-Tuesdays 3:00-5:00 PM EASTERN

Study Halls-Thursdays 4:00-5:00 PM EASTERN

Session 1	9/28	3:00-5:00 PM
Session 2	10/5	3:00-5:00 PM
Session 3	10/12	3:00-5:00 PM
Session 4	10/19	3:00-5:00 PM
Session 5	11/2	3:00-5:00 PM
Session 6	11/9	3:00-5:00 PM
Session 7	11/16	3:00-5:00 PM
Session 8	11/30	3:00-5:00 PM
Session 9	12/7	3:00-5:00 PM
Session 10	12/14	3:00-5:00 PM
Optional		
Study Hall	9/30	4:00-5:00 PM
Study Hall	10/7	4:00-5:00 PM
Study Hall	10/14	4:00-5:00 PM
Study Hall	11/4	4:00-5:00 PM
Study Hall	11/11	4:00-5:00 PM
Study Hall	11/18	4:00-5:00 PM
Study Hall	12/2	4:00-5:00 PM
Study Hall	12/9	4:00-5:00 PM