

## 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



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### Financial Advisory

#### Course Schedule

Session 1	10/07/20 Wed	2:30-4:30pm Eastern
Session 2	10/09/20 Fri	2:30-4:30pm Eastern
Session 3	10/14/20 Wed	2:30-4:30pm Eastern
Session 4	10/21/20 Wed	2:30-4:30pm Eastern
Session 5	10/28/20 Wed	2:30-4:30pm Eastern
Session 6	11/4/20 Wed	2:30-4:30pm Eastern
Session 7	11/18/20 Wed	2:30-4:30pm Eastern
Session 8	12/2/20 Wed	2:30-4:30pm Eastern
Session 9	12/9/20 Wed	2:30-4:30pm Eastern
Session 10	12/16/20 Wed	2:30-4:30pm Eastern