

## 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



## Certified Transformative Advisor Program

### Financial Advisory

#### Course Schedule and Optional Study Hall

<b>CTAF Financial Advisory Mondays 12-2pm Eastern (Optional Study Halls on Thursdays 3-4 pm)</b>		
Session 1	9/27/21	12-2pm
Session 2	10/4/21	12-2pm
Session 3	10/11/21	12-2pm
Session 4	10/18/21	12-2pm
Session 5	11/1/21	12-2pm
Session 6	11/8/21	12-2pm
Session 7	11/15/21	12-2pm
Session 8	11/29/21	12-2pm
Session 9	12/6/21	12-2pm
Session 10	12/13/21	12-2pm
<b>OPTIONAL</b>		
Study Hall	9/30/21	3-4pm
Study Hall	10/7/21	3-4pm
Study Hall	10/14/21	3-4pm
Study Hall	10/21/21	3-4pm
Study Hall	11/4/21	3-4pm
Study Hall	11/11/21	3-4pm
Study Hall	11/18/21	3-4pm
Study Hall	12/2/21	3-4pm
Study Hall	12/9/21	3-4pm
Study Hall	12/16/21	3-4pm