Advanced Excel for Finance Training Course

Professional Development Training Course Outline

Category	ACCOUNTING & FINANCE	**Duration**	10 Days
Base Fee	$3,000 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Advanced Excel for Finance Training Course is designed to equip professionals with cutting-edge financial modeling, data analysis, and Excel automation skills. This course integrates advanced Microsoft Excel techniques for financial forecasting, budgeting, investment analysis, risk management, and corporate financial decision-making. It is tailored for modern finance professionals who aim to improve efficiency, accuracy, and strategic insight using advanced spreadsheet tools.

In today's data-driven financial environment, mastering Excel for finance is a critical competitive advantage. This course focuses on advanced formulas, pivot tables, Power Query, Power Pivot, dashboards, VBA automation, and financial modeling techniques used by global investment banks, corporate finance teams, and financial analysts. Participants will gain practical exposure to real-world financial datasets and global case studies to enhance decision-making and analytical capabilities.

Programme Curriculum

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financial analysts. Participants will gain practical exposure to real-world financial datasets and global case studies to enhance decision-making and analytical capabilities.

Course Objectives

1. Master advanced Excel functions for financial analysis and reporting
2. Develop professional financial models for corporate decision-making
3. Enhance budgeting, forecasting, and variance analysis skills
4. Apply Excel tools for investment appraisal and valuation techniques
5. Build dynamic financial dashboards for business intelligence
6. Automate financial reporting using VBA and macros
7. Strengthen cash flow modeling and scenario analysis skills
8. Improve risk modeling and sensitivity analysis techniques
9. Utilize Power Query and Power Pivot for data transformation
10. Apply real-time financial data analytics using Excel tools
11. Develop proficiency in portfolio and investment analysis
12. Strengthen data visualization for financial storytelling
13. Enhance strategic financial planning and corporate reporting

Organizational Benefits

- Improved financial decision-making accuracy
- Enhanced productivity in financial reporting
- Reduced manual errors through automation
- Faster budgeting and forecasting cycles
- Better strategic planning capabilities
- Increased efficiency in financial analysis
- Stronger data-driven business insights
- Enhanced corporate financial transparency
- Improved risk management frameworks
- Higher ROI from financial planning processes

Target Audiences

1. Financial analysts and investment professionals
2. Corporate finance managers and executives
3. Accountants and auditors
4. Business analysts and data analysts
5. Banking and investment professionals
6. MBA finance students and graduates
7. Entrepreneurs and business owners
8. Consultants and financial advisors

Course Duration: 10 days

Course Modules

Module 1: Excel Fundamentals for Finance

- Financial spreadsheet structure understanding
- Basic formulas for finance applications
- Data entry best practices
- Financial formatting standards
- Case study: Retail finance reporting (Global retail chain)
- Financial accuracy validation techniques

Module 2: Advanced Excel Formulas

- Nested formulas for financial calculations
- Logical functions in finance modeling
- Lookup functions for data analysis
- Error handling in financial models
- Case study: Banking loan analysis (Global bank model)
- Formula auditing techniques

Module 3: Financial Modeling Basics

- Structure of financial models
- Assumptions and drivers setup
- Revenue forecasting techniques
- Expense modeling frameworks
- Case study: Startup valuation model (Silicon Valley startup)
- Model validation techniques

Module 4: Budgeting and Forecasting

- Corporate budgeting frameworks
- Rolling forecast models
- Variance analysis techniques
- Scenario planning tools
- Case study: Manufacturing budget control (Global manufacturing firm)
- Forecast accuracy improvement methods

Module 5: Investment Appraisal Techniques

- NPV and IRR modeling in Excel
- Payback period analysis

- Capital budgeting models
- Investment comparison tools
- Case study: Infrastructure investment (Global infrastructure project)
- Decision-making frameworks

Module 6: Financial Dashboards

- Dashboard design principles
- KPI tracking in Excel
- Interactive charts and visuals
- Dynamic reporting tools
- Case study: Corporate dashboard (Fortune 500 company)
- Real-time financial monitoring

Module 7: Data Analysis Tools

- Pivot tables for financial data
- Pivot charts and slicers
- Data segmentation techniques
- Trend analysis tools
- Case study: Retail sales analytics (Global supermarket chain)
- Financial data summarization

Module 8: Power Query for Finance

- Data extraction and transformation
- Cleaning financial datasets
- Automated data workflows
- Multi-source integration
- Case study: Banking data consolidation (Global bank system)
- ETL process automation

Module 9: Power Pivot and Data Models

- Data modeling techniques
- Relationship building in datasets
- DAX calculations for finance
- Advanced analytics modeling
- Case study: Investment portfolio analysis (Global hedge fund)
- Scalable financial models

Module 10: VBA and Automation

- Introduction to VBA scripting
- Automating financial reports
- Macro creation for finance tasks
- Workflow automation techniques
- Case study: Automated reporting system (Global accounting firm)
- Efficiency optimization

Module 11: Risk Analysis in Excel

- Financial risk modeling
- Sensitivity analysis tools
- Scenario simulation models
- Risk mitigation strategies
- Case study: Banking risk model (International bank)
- Stress testing frameworks

Module 12: Portfolio Management

- Portfolio performance analysis
- Asset allocation models
- Return and risk optimization
- Diversification strategies
- Case study: Global investment portfolio (Asset management firm)
- Performance benchmarking

Module 13: Cash Flow Modeling

- Cash flow forecasting techniques
- Operating cash flow analysis
- Free cash flow modeling
- Liquidity management tools
- Case study: Corporate cash flow (Multinational corporation)
- Financial stability assessment

Module 14: Financial Reporting Automation

- Automated report generation
- Standard financial statements in Excel
- Consolidation techniques
- Real-time reporting systems
- Case study: Global audit firm reporting system

- Compliance reporting tools

Module 15: Strategic Financial Decision Making

- Strategic financial planning models
- Business performance analysis
- Investment decision frameworks
- Long-term financial planning tools
- Case study: Global corporate strategy model (Top multinational firm)
- Executive decision support systems

Training Methodology

- Instructor-led interactive sessions
- Hands-on Excel practical exercises
- Real-world financial case studies
- Project-based learning approach
- Group financial modeling assignments
- Live corporate simulation exercises
- Step-by-step guided demonstrations
- Assessment-based learning evaluation

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.
f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	04 Dec 2026	Online	$2,000
23 Nov 2026	04 Dec 2026	Physical	$3,000
23 Nov 2026	04 Dec 2026	Physical	$6,000
23 Nov 2026	04 Dec 2026	Physical	$6,000
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$9,000
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$12,000

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