FINANCIAL PLANNING & ANALYSIS (FP&A) PROGRAM





CFI EDUCATION





CORPORATE FINANCE INSTITUTE™

YOUR JOURNEY IN FINANCE MADE EASIER

ABOUT US

- 30,000+ learners
- 13+ years of history
- 350+ batches
- 45000+ hours of training
- Founded in 2013



WHO WE ARE

Corporate Finance Institute ™ (aka “CFI Education” or “CFI”) is a team of passionate educators with more than a decade of experience in the industry, bringing real-life business problems to the classroom. CFI offers extremely practical program training like Financial Modeling, Investment Banking, and CFA Prep program with placement assistance and its an India based organization.”

USP

Our USP is to apply real-life skills to the classroom making all our finance training extremely effective to our students / candidates. Post completion of the program, candidates were able to crack interviews / placed with big MNCs including RESEARCH AND ANALYTICS companies, boutique investment banks, advisory firms, credit rating agencies, and financial services companies.

Accreditation / Partnership

FMI
FINANCIAL MODELING INSTITUTE

LEARNING ROADMAP



LIVE INSTRUCTOR BASED TRAINING



EACH TOPIC COVERED PRACTICALLY



ASSIGNMENT ON EACH TOPIC



CAPSTONE PROJECTS



ASSESSMENT TEST



INTERVIEW PREPRATION



RESUME BUILDING & PLACEMENT SUPPORT

PROFESSIONAL TRAINING PROGRAM FOR

FINANCIAL PLANNING & ANALYSIS (FP&A) PROGRAM

Financial Planning & Analysis (FP&A) Program

The FP&A Program is a strategic finance professional program designed to equip candidates with the technical, analytical and business skills required to work in modern corporate finance and FP&A functions.

The program combines comprehensive financial modeling and valuation training with specialized FP&A concepts, practical business case studies, management reporting and career preparation.

WHY CFI EDUCATION?

- 140+ Hours of Live Training
- 30 Hours of Project-based Learning
- Soft Skills and CV Building
- Interview Prep and Placement Assistance
- AI Chat GPT in MS Excel Module - *New*
- Prepare for AFM Certification from FMI Canada

WHO CAN GO FOR THIS PROGRAM

BCom, BBA, MBA, CA, ACCA, CPA, or similar qualifications in Finance, Economics, and Commerce Graduates / Engineers with a desire to work in the finance industry

Finance Professionals aspiring for FP&A, Business Finance, Corporate Finance, Budgeting & MIS roles in corporates, IB, research firms, banks, and consultancy

CFI Education is a professional institution engaged in providing niche financial training to individuals, institutions, and corporations. Our training programs have been designed after in-depth research by finance professionals with years of experience at worldclass financial companies. A solid combination of on-job and academic training experience helps our trainers to provide a 360° overview of the subject to the audience.

100% PLACEMENT SUPPORT

We charge a placement fee of 5% of annual fixed CTC. This fee is applicable only when a candidate is selected through our placement team's efforts and accepts the job offer. Free "CFI-AI Coach" Access for doubt clarity and interview preparation

COURSE CURRICULUM

3 Months | 20 Modules | 140+ Hours

PART 1: FINANCIAL MODELING & VALUATION (Modules 1–10)

Module 1 – MS Excel Training: Basic to Advanced Excel

- Keyboard shortcuts
- AI and ChatGPT in Excel
- Excel lists
- Auto Fill
- Cut, copy, paste, and Paste Special
- Find and Replace
- Sorting and filtering
- Advanced formatting
- Mathematical, text, statistical, date/time, array, database, logical, lookup, and financial functions
- What-if analysis
- Pivot Tables and Pivot Charts
- Dashboard creation
- VBA macro basics

Module 2 – MS PowerPoint Skills

- Financial charts
- PowerPoint writing, formatting, and alignment
- Professional financial presentations
- Pitch creation and overview slides
- Linking Excel charts into PowerPoint

Module 3 – Financial Statement Analysis

- Financial statements
- Income statement, balance sheet, and cash flow statement
- Annual report reading
- MD&A
- Ratio analysis
- DuPont analysis

Module 4 – Business & Financial Modeling

- Three-statement modeling
- Revenue and cost modeling
- Depreciation, working capital, debt, equity, and asset schedules
- Scenarios
- Dynamic financial models
- Corporate action adjustments

Module 5 – Discounted Cash Flow (DCF) Valuation

- DCF valuation
- Cost of equity
- Cost of debt
- WACC
- FCFF and FCFE
- Terminal value
- Football field analysis

Module 6 – Comparable Company Analysis

- Comparable company selection
- Financial information sourcing
- Financial ratios and trading multiples
- Valuation using comparable companies
- EBIT, EBITDA, and net income adjustments
- Options, warrants, RSUs
- Calendarization and LTM
- Valuation interpretation

Module 7 – Comparable Transaction Analysis

- Precedent transactions
- Comparable acquisition selection
- Deal-related and financial information
- Transaction multiples
- Benchmarking acquisitions
- Valuation using comparable acquisitions
- Normalization of EBIT, EBITDA, and net income
- Transaction valuation interpretation

Module 8 – Project Finance & Real Estate Modeling

- Project finance
- Sources and uses of funds
- IRR, MIRR, NPV, profitability index
- Discounted payback period
- Project finance case study
- Real estate financial modeling
- NOI, cap rate, CoCR
- Debt amortization
- Real estate case study

Module 9 – Company Profile & Pitchbook

- Use of financial models in pitchbooks
- M&A and restructuring transaction flow
- Company profiles
- Best practices
- Live case discussions

Module 10 – Sector Models, Statistics & Reference Materials

- Sector-specific models: Retail
- Sector-specific models: Automobile
- Sector-specific models: E-commerce
- Sector-specific models: FMCG
- Statistical models
- Interest rates and economics
- Levered vs unlevered beta
- Levered vs unlevered cash flow
- Levered vs unlevered IRR
- Treasury Stock Method
- Shares outstanding vs weighted average shares
- Doubt clearing and reference materials

PART 2: FINANCIAL PLANNING & ANALYSIS (FP&A) (Modules 11–18)

Module 11 – Introduction to FP&A & Career Landscape

- What FP&A is
- FP&A vs accounting, controllership, and treasury
- FP&A analyst roles
- Career path from analyst to CFO
- FP&A organizational structure
- B2B, B2C, subscription, product, and service business models
- FP&A's role in business decision-making

Module 12 – FP&A Terminology & Business Fundamentals

- FP&A terminology
- Cash burn and runway
- Headcount costs
- OPEX vs CAPEX
- Business drivers
- FP&A value addition
- Industry landscape overview

Module 13 – Accounting Concepts for FP&A

- Accrual vs cash accounting
- Revenue recognition basics
- Fixed, variable, and semi-variable costs
- Gross margin, EBITDA, EBIT, and net margin
- Working capital
- Accounts receivable, accounts payable, and inventory

Module 14 – Budgeting Frameworks & Annual Operating Plan (AOP)

- Budgeting and financial planning
- Zero-based budgeting
- Incremental budgeting
- Rolling budgeting
- Top-down vs bottom-up budgeting
- AOP cycle
- Stakeholder inputs and timelines
- Practical exercise: AOP timeline mapping

Module 15 – Driver-Based Forecasting

- Financial forecasting
- Business drivers
- Revenue forecasting by product, region, and segment
- Rolling forecasts
- Best, base, and worst-case scenarios
- What-if analysis
- Practical exercise: Driver-based forecast

Module 16 – Variance Analysis

- Actual vs budget vs forecast analysis
- Variance analysis templates
- Price-volume-mix analysis
- Favourable and unfavourable variances
- Common variance analysis mistakes
- GenAI for financial commentary and variance analysis
- Practical exercise: Variance report

Module 17 – Management Reporting & KPI Dashboards

- MIS
- Management and executive reporting
- Financial and operational KPIs
- Revenue and profitability metrics
- Dashboard development
- Business review reporting
- Practical exercise: Management reporting

Module 18 – Storytelling with Numbers

- Translating financial data into business insights
- Executive summaries and financial commentary
- Business trends and performance drivers
- Board and CFO-level presentations
- Communicating financial performance to management
- Common reporting and communication mistakes
- Practical exercise: Commentary for a live financial report

Module 19 – Soft Skills & CV Building

- Interview process do's and don'ts
- CV edits
- LinkedIn profile building

Module 20 – Mock Interviews

- Candidates must sit for mock interviews and clear the rounds to become eligible for placements.

3 Months | 20 Modules | 140+ Hours

FEE STRUCTURE

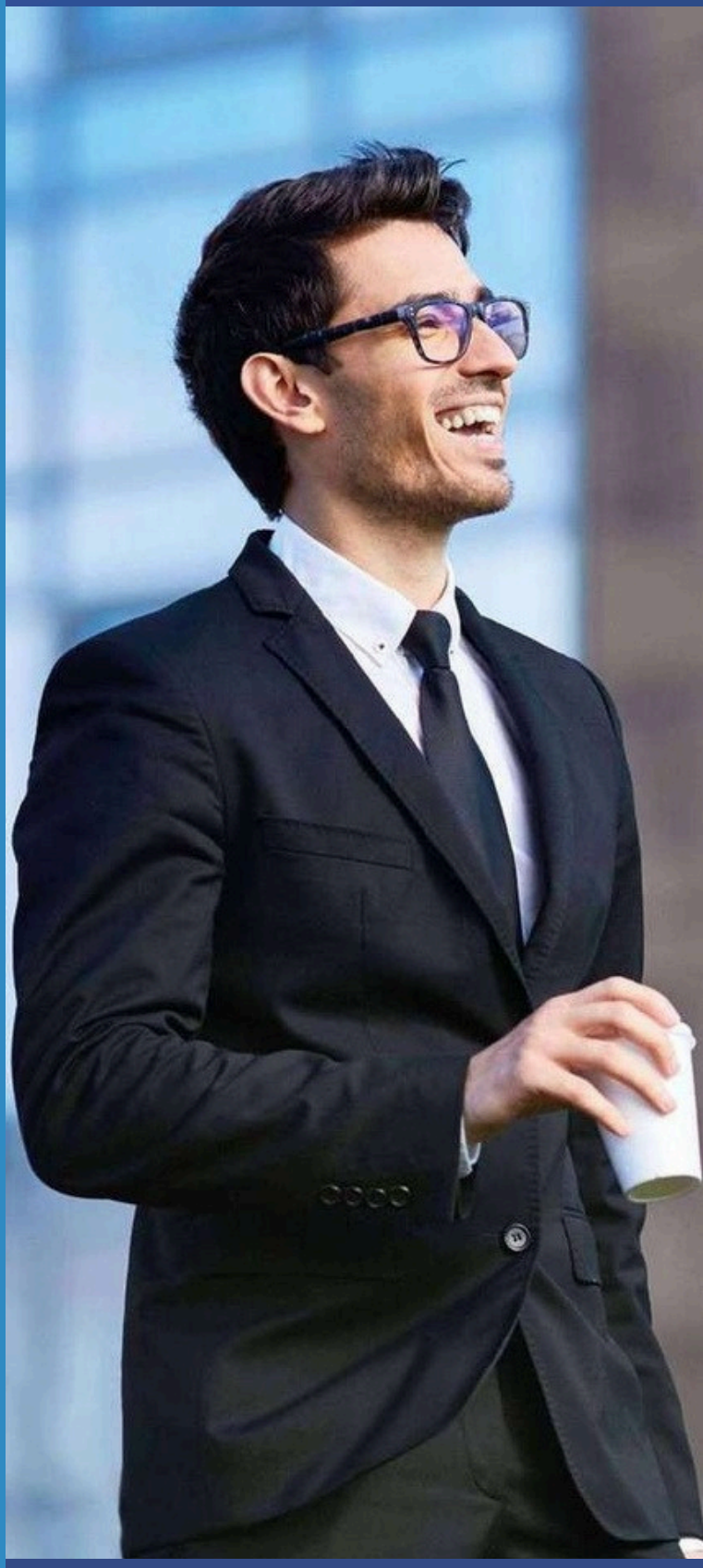
Live Program – INR 60,000

AREAS WHERE FINANCIAL PLANNING & ANALYSIS (FP&A) PROGRAM IS USED

- Banking & Financial Services (BFSI)
- Information Technology (IT)
- Manufacturing
- FMCG
- E-commerce
- Healthcare & Pharmaceuticals
- Retail
- Consulting
- Telecom
- Energy & Utilities
- Logistics & Supply Chain
- Startups & Unicorns

PROFILES YOU CAN TARGET AFTER THE FINANCIAL PLANNING & ANALYSIS (FP&A) PROGRAM

- Corporate Finance Analyst
- Finance Business Partner
- Management Reporting Analyst
- MIS Analyst (Finance)
- Performance Analyst
- Decision Support Analyst
- Financial Controller (Entry Level)
- Business Controller



STUDENT SPEAK / REVIEW

"Started my career with CFI Education and I must say the staff & faculty are very helpful and the course they offer is really important and informitive from a finance perspective."

DIVYAM KUKREJA



"Excellent teachers, comprehensive curriculum, helps in placement also. I would recommend this institute for gaining knowledge of financial modeling."



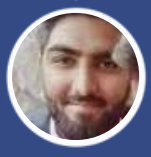
RAMIT KHATTER

"The experience with CFI Education was amazing. The faculties are really great, the way they deliver the things which helped us a lot. Overall the knowledge I gained really great."

MONIKA DEMIWAL



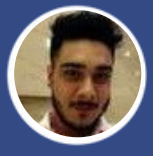
"Very effective faculty for financial modeling and prep for CFA level 1. Helped me in clearing both and helped me landing into a relevant job. The owner is pretty experienced and humble guy, keeps you motivated."



CHEMS ARORA

"CFI Education has one of the best faculty with the best content of the study."

DIVYANSHU SHARMA



"Great learning experience all faculty have great experience."



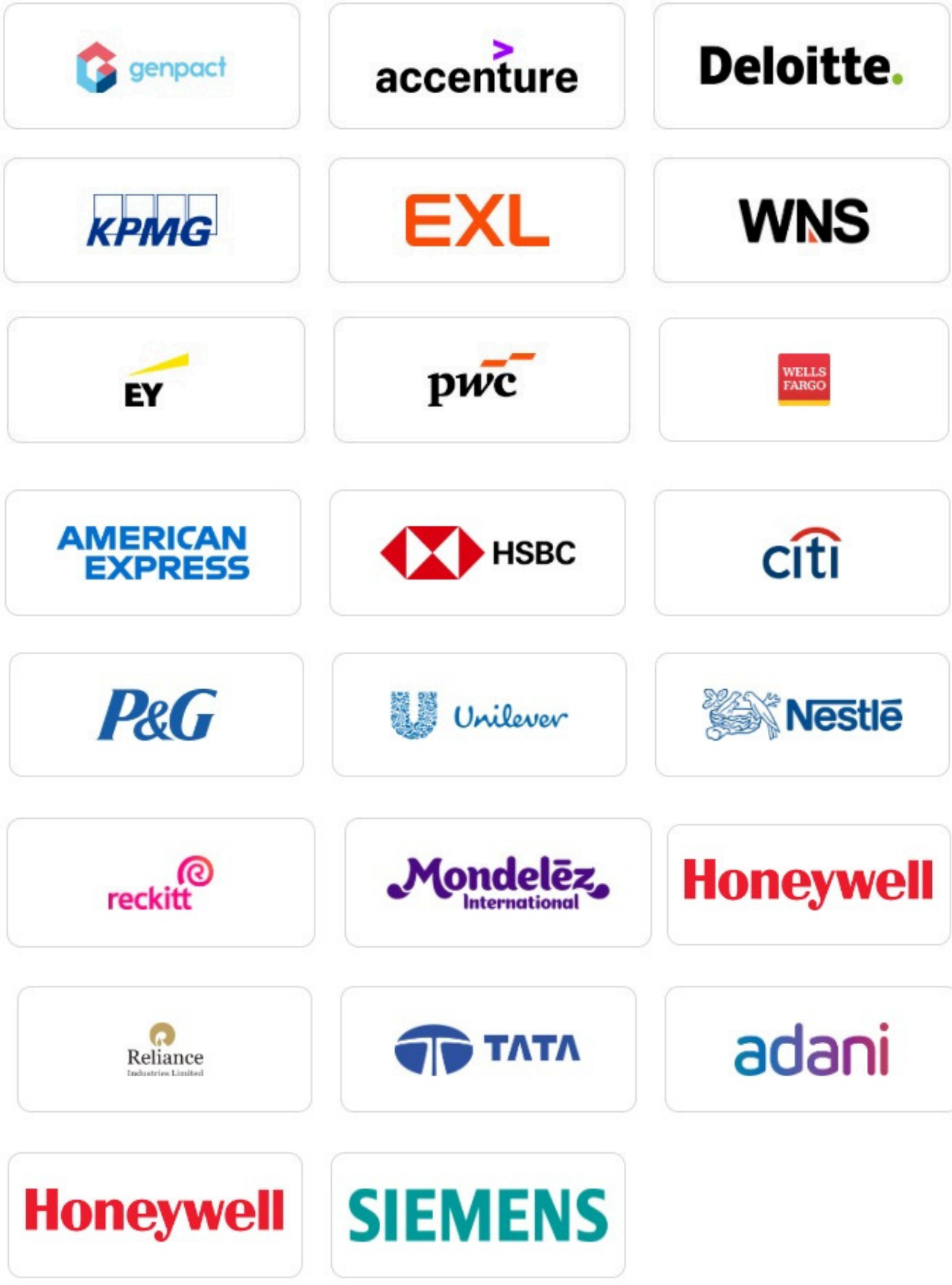
SHWETA GUPTA

Google Reviews

4.8 ★★★★★ 94 reviews

4.8 out of 5

SELECT RECRUITERS



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