

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



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

WHY CFI EDUCATION?

- 120+ 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.

"FP&A has become the bridge between finance and business strategy — one of the most sought-after skills for finance professionals today."

WHY FP&A? CAREER & PLACEMENT ADVANTAGE

FP&A (Financial Planning & Analysis) is one of the fastest-growing and most in-demand finance functions across every industry — not just BFSI, but also IT, manufacturing, FMCG, e-commerce, pharma, and startups

FP&A professionals work directly with the CFO's office, business heads, and leadership teams — offering high visibility and faster career growth

Roles this program prepares you for: FP&A Analyst, Budget Analyst, Business Finance Analyst, MIS Analyst, Financial Planning Manager, Corporate Finance Analyst

Combines core financial modeling skills with strategic business partnering — budgeting, forecasting, variance analysis, and KPI reporting are used in virtually every company

A strong differentiator in placements: recruiters actively seek candidates who can build models AND translate numbers into business decisions

FP&A skills are transferable across industries and geographies, making candidates more employable and future-proof

Clear long-term career path: FP&A Analyst → FP&A Manager → Head of FP&A → CFO

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

DAY WISE CLASS SCHEDULE

DAY 1 – MS EXCEL BASICS

- Keyboard shortcuts, Paste Special Functions (Mathematical, Text, Stats, Date and Time, Transpose, Sumproduct),
- Sum, Product, Power, SQRT, ABS, Lower, Upper, Text, Search, Len,
- Replace, Left, Right, Count, Min, Max, Average, CountA, AverageA, Today, Now, EOMonth, etc.

DAY 2 – MS EXCEL INTERMEDIATE

- Stats Functions (SumIF, CountIF, SumIFS, CountIFS, AverageIF etc)
- Informative Functions (Isblank, Isnumber, Istext, Iserr)
- Database Functions (Dsum, Daverage, Dcount, Dmin)
- Logical Functions (If, Iferror, And, Or, True, False)
- Look and Reference Functions (Vlookup, Hlookup, Indirect, Index Match etc)
- Financial Functions (PV, FV, NPV, PMT etc)

DAY 3 – MS EXCEL INTERMEDIATE TO ADVANCED

- Grouping / Ungrouping
- Creating Drop Down List
- Conditional Formatting
- Data Validation
- What if Analysis (Goal Seek, Scenario, Data Table)

DAY 4 – EXCEL CHARTS / DASHBOARD / VBA / MACROS

- Creating Pivot Table and Charts, Column, Stacked Column and Bar Charts
- Line Chart, Pie chart, Waterfall Chart
- Design a Simple Dashboard using Charts & Graphs
- Link charts with Presentations
- Introduction to VBA / Macros; Macro Recording, Running, Setup

DAY 5 & 6 – FINANCIAL STATEMENT ANALYSIS / RATIO ANALYSIS

- Introduction to Financial Statements
- Quick Tips to Read an Annual Report
- Discussion on IS, BS, and CF
- Concept of EBIT and EBITDA
- Ratio Analysis: Profitability, Liquidity, Leverage, Coverage
- Free Cash Flow: FCFF and FCFE

DAY 7 – INTRODUCTION TO FP&A & CAREER LANDSCAPE

- What is FP&A – Role vs Accounting, Controllershship, Treasury
- Role of an FP&A Analyst
- FP&A Career Path – Analyst to CFO progression
- Where FP&A Sits in an Organization – reporting lines & stakeholders
- Types of Business Models – B2B, B2C, Subscription, Product vs Service
- Q&A and Career Path Discussion

DAY 8 – FP&A TERMINOLOGY & BUSINESS FUNDAMENTALS

- Key FP&A Terms – Runway, Burn, Headcount Cost, OPEX/CAPEX
- Understanding Business Drivers
- How FP&A Adds Value to a Business
- Industry Landscape Overview

DAY 9 – ACCOUNTING CONCEPTS FOR FP&A

- Accrual vs Cash Accounting
- Revenue Recognition Basics
- Cost Classification – Fixed, Variable, Semi-variable
- Margin Metrics – Gross Margin, EBITDA, EBIT, Net Margin
- Working Capital Basics – AR, AP, Inventory

DAY 10 – BUDGETING FRAMEWORKS & AOP

- Zero-Based, Incremental and Rolling Budgeting
- Top-Down and Bottom-Up Budgeting
- Annual Operating Plan (AOP) Cycle
- Stakeholder Inputs & Timelines
- Practical Exercise – AOP Timeline Mapping

DAY 11 – DRIVER-BASED FORECASTING

- Identifying Business Drivers
- Rolling Forecasts
- Revenue Forecasting – by Product/Region/Segment
- Best/Base/Worst Case Scenarios
- What-If Analysis
- Practical Exercise – Build a Driver-Based Forecast

DAY 12– VARIANCE ANALYSIS

- Actual vs Budget vs Forecast Analysis
- Building Variance Templates
- Price-Volume-Mix Variance Analysis
- Common Variance Analysis Mistakes
- GenAI for Commentary & Variance Analysis
- Practical Exercise – Build a Variance Report

DAY 13 – MANAGEMENT REPORTING & KPI DASHBOARDS

- Management Information System (MIS) – it includes management reporting
- Executive Reporting – commentary to leadership
- Financial & Operational KPIs
- Dashboard Development
- Business Review Reporting
- Practical Reporting Exercise

DAY 14– DASHBOARD BUILDING IN EXCEL

- Chart Types for FP&A Reporting
- Dynamic Dropdowns & Conditional Formatting
- KPI Cards & Visual Indicators
- Building an Interactive Dashboard
- Practical Exercise – Build a Sales Dashboard

DAY 15 – STORYTELLING WITH NUMBERS

- Translating Data into Business Insights
- Writing Executive Summaries & Commentary
- Structuring a Board/CFO-Ready Narrative
- Common Mistakes in Reporting Communication
- Practical Exercise – Write Commentary for a Live Report

DAY 16 -BUSINESS PARTNERING FUNDAMENTALS

- What Business Partnering Means – Reporting to Advising
- Partnering with Sales & Marketing – CACs
- Building Cross-Functional Relationships
- Understanding Non-Finance Stakeholder Priorities
- Practical Exercise – Mock Sales Partnering Discussion

DAY 17 – CAPSTONE MODEL BUILD

- Assembling a Full Company Model
- Stress-Testing the Model
- Peer Review & Feedback
- Model Presentation
- Practical Exercise – Present Your Model

DAY 18 – PRESENTING TO LEADERSHIP

- Structuring a Board/CFO Deck
- The "So-What" – Insight Over Information
- Handling Pushback & Difficult Conversations
- Negotiation Basics for FP&A
- Practical Exercise – Mock Leadership Presentation

DAY 19 – SOFT SKILLS & CV BUILDING

PROJECT WORK & MOCK INTERVIEWS

- Assessment test: There will be an assessment test for Program Completion Certificate.
- Project Work: Post Classroom Sessions, candidates are asked to complete an integrated project covering all the training aspects of the program (Duration ~1 Month).
- Outcome: Training will help candidates get a hold of the concepts and make them ready for facing interviews.

FEE STRUCTURE

INR 45,000

Duration: 2.5 Months (Weekend Program)
(Saturday and Sunday - 4 Hours each day)

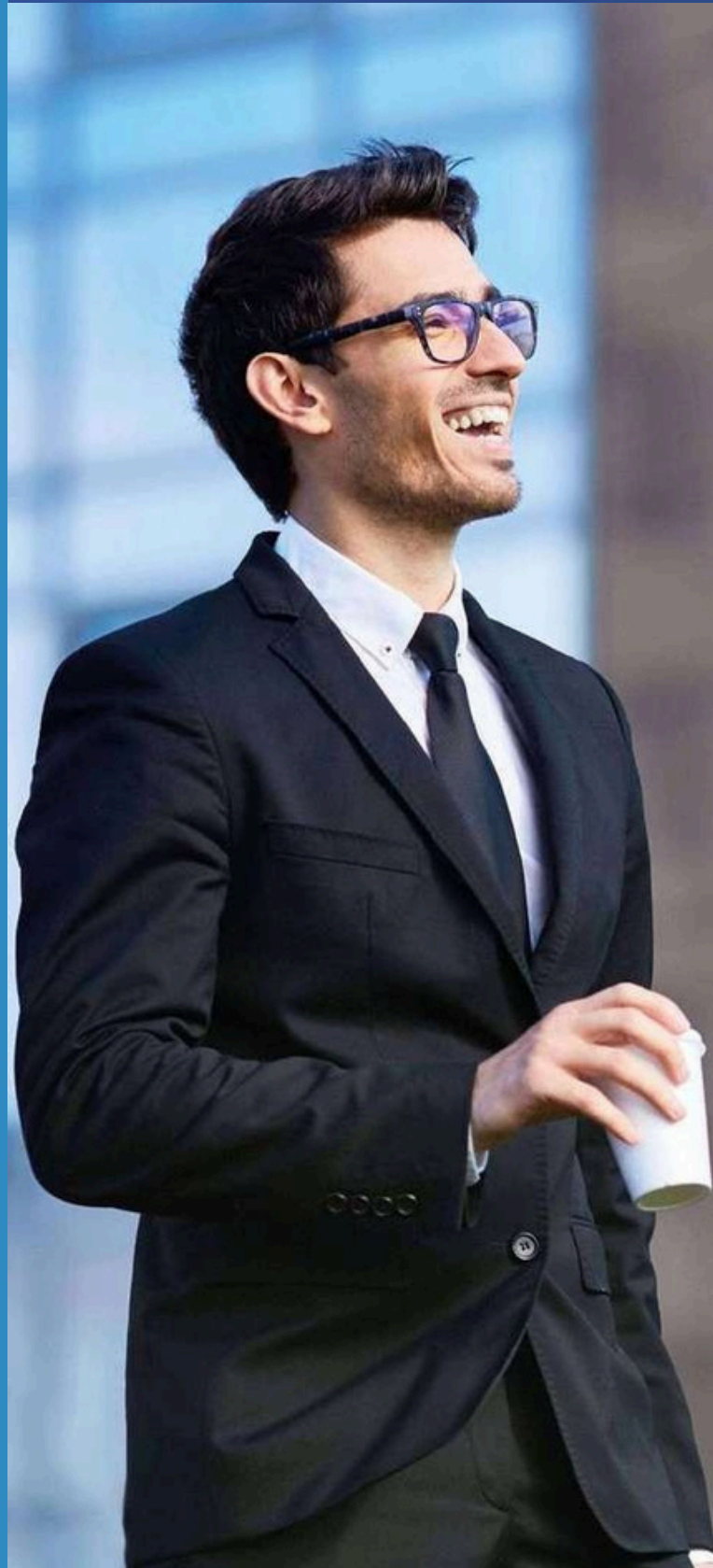
- **100% Placement Support:** We charge a placement fee of 5% of annual fixed ctc. This fee is applicable only when candidates is selected through our placement team efforts and accepts the job offer.

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 informative 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



4.8 ★★★★★ 94 reviews



★ 4.8 out of 5

SELECT RECRUITERS





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