

F1F9

www.f1f9.com



Working with **Financial Models**



In-house



Open



Tutor-led distance learning

We are Financial Modelling Experts /

Our highly knowledgeable instructors provide training that allows anyone to build models that are easy to understand, with fewer errors, in less time. Whether you need to understand and use models, review them or build your own, one of our courses will be perfect for you.

Our intensive in-person courses are run in major cities and can also be organised for your company in-house.

If you prefer the convenience of developing modelling skills in your own time, our online courses are taught using video tutorials that you can watch as many times as you need to – access is unlimited.

You can also opt for courses in the form of scheduled live tutorials and benefit from time with our instructors wherever you are in the world.

Whichever option you choose; we offer ongoing support from our team of modelling experts so you can continue to develop your skills long after you complete the course.

Visit www.f1f9.com/financial-modelling-courses to find out more.



F1F9 is accredited by the
FAST Standard Organisation Ltd
to deliver FAST training courses.
See: www.FAST-standard.org/training for details

*“Thanks to the instructor,
he did a splendid job”*

EBRD delegate

MARCH 2018

Key benefits /

This course teaches the skills and principles needed to work safely with financial models, including how to test and review them. It is practical, hands-on, and suitable for all model types and business sectors.

At the end of the course you will be able to:

- Navigate and read models more effectively
- Understand the best practices that models should follow
- Perform technical review of the model, including review for inconsistent formulas, embedded constants, unused inputs and workings
- Build a best practice input structure including scenario and sensitivity functionality
- Implement structures to maintain version control and audit trail
- Undertake high level analytical review on the model's outputs and a more focussed review on targeted elements of the model

Who is it for? /

Target audience

This course is designed for professionals who need to work with and rely on complex financial models, either on an ongoing basis or to support a particular transaction.

The case study for the course is based upon a going concern but the principles and techniques we teach are transferable to all business sectors and all types of financial models.

Teaching approach

Course participants will find that the training is practical and hands-on, whichever form of course delivery they choose.

You will start using the model review and remediation techniques early on in the course as the instructor takes you through the case study model. We welcome questions, discussion and input from course participants, and our team of expert modellers will be available to support you as you put what you have learned into practice.

What will I learn? /

You will work with the instructor on a case study financial model. After familiarising yourself with the model you will assess it for compliance with modelling best practices, identify any technical errors, undertake scenario analysis, and perform a high level review.

During the course you will learn Excel shortcuts and functionality that will improve your efficiency and effectiveness. You will also develop template Excel structures to enable you to run scenarios efficiently, maintain a clear audit trail and undertake reviews of movements in model outputs.

Course Agenda

1. Setting up for working with a new model. Using Excel functionality and shortcuts for model navigation and review. Creation of a version control structure.
2. Familiarisation with the model's features. Performing a high-level analytical review of the outputs.
3. Explanation of best practices and why they're important. Consideration of the level of risk the model poses and the importance of the model's results.
4. Technical review of the model. Inconsistent formulas, embedded constants, unused inputs, unused workings, Excel errors, misplaced inputs.
5. Further targeted review of the model. Interrogating formulas. Further technical review. Consideration of other review methods.
6. Implementing a best practice structure for scenarios and sensitivities. Running scenarios and analysing the impact on the model's outputs.

How can I attend this course? /



In-house

This course can be delivered for a group at your offices on a date to suit you. In-house training offers the flexibility to condense or expand the course agenda and number of training days to suit the abilities and interests of your group.

We recommend that class sizes are capped at 10. Contact us and we'll be happy to discuss course tailoring, fees and dates.



Open

Individuals interested in face-to-face, immersive training can attend one of our public courses.

During one intensive classroom day you will benefit from the experience of the instructor and also interaction with your fellow participants. You can focus on the course content free from distractions, and classes are limited to 10 to make sure everyone gets the attention they need.



Tutor-led distance learning

This is ideal if you prefer time to practise and absorb learning between sessions with a tutor.

As long as you have a good internet connection you can join our instructor for 6 hour-long tutorials over 2 non-consecutive days, giving you a chance to practise the techniques after each live tutorial and between classroom days. The tutorials are limited to 8 participants.

Who will be teaching this course? /

John Dimberline



John is an expert financial modeller with over 21 years of experience working on a wide range of sectors and project types.

His career began at Grant Thornton advising public and private sector clients on PFI/PPP projects in the UK, covering all aspects of financial advisory. During his time here John closed over 12 projects acting as the lead financial adviser. John became responsible for the firm's national financial modelling team in 2011, overseeing a wide variety of modelling assignments and including model audits.

John joined F1F9 in 2013 to be responsible for the delivery of modelling projects by

our Delhi based modelling team. This has given John exposure to a far wider range of projects, working on projects in infrastructure, utilities, power, oil and gas, and numerous other sectors for corporate clients.

As well as his model delivery role, John is a lead instructor for the training team and has taken a key role in ensuring that each part of the business complement the other for maximum benefit to clients. He has responsibility for our model review services and is also the author and lead instructor for our Working with Financial Models course.

John graduated from the University of Bath in 1999 with BSc (Hons) in Biochemistry.

Before and after /

Pre-course work

We recommend that you complete our online Excel Proficiency Skills course before your training - it covers the Excel set up and key techniques that are ideal for modelling.

You may also want to complete our Model Construction Skills course to gain an understanding of FAST model layout and build techniques, but this is not essential. Both courses will be made available to you free of charge.

Requirements

You will need a laptop to use during the course, ideally one with a Microsoft Windows operating system and a familiar keyboard. It will need to have Excel 2007 or later installed. If you are travelling from outside the UK you will need to bring an adapter for your laptop's power lead.

Tutor-led distance learning participants will need a reliable internet connection to attend the course tutorials.

Post-course support

Our objective is to support you as you put what you have learned into practice

Your course fee includes open-ended access to our online learning environment and our support forum. Any questions raised through the support forum will be answered within 24 hours, and often much quicker.

*“Excellent training...
Engaging trainer who
answered all my questions
and adjusted to the pace
of the class”*

EBRD delegate

MARCH 2018

Making models less complicated /

[FIND OUT MORE ABOUT OUR COURSES >](#)

[TAKE OUR FREE ONLINE COURSE >](#)

[READ THE F1F9 BLOG](#)

Whatever your business, we've modelled it...



How can we help you? /

We teach financial modelling courses all over the world. And all of them are based on the FAST Standard – a widely used, independent financial modelling standard that is open to all.

We also run a busy financial modelling practice building, reviewing and maintaining financial models used by leading corporates, advisors, banks and funds.

Financial modelling is our core business.

This is what we do.

To find out how we can help you and your team to develop your modelling skills call **John Dimberline** on **+44 1225 290525** or email **john.dimberline@f1f9.com**

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