



# FINXL

THIS TIME IT'S DIFFERENT

## CERTIFICATION PROGRAM IN

## FINANCIAL PLANNING & ANALYSIS (FP&A)

LEARNING

APPLICATION

EMPLOYMENT

## COURSE HIGHLIGHTS

- ✔ Certified Financial Planning & Analysis course with 100% Job Assistance
- ✔ 3/6 months Internship with Analytics firm
- ✔ Real time technical interview preparation by FP&A Professionals
- ✔ 100+ questions questionnaire and its best possible answers guide
- ✔ Learn best Planning, Budgeting, Forecasting & Reporting practices used in industry
- ✔ Project and case study based teaching in key subjects
- ✔ Prepare a Company's Budget from Scratch
- ✔ Build an Integrated Financial Model
- ✔ Be part of our vast Financial Planning & Analysis alumni network
- ✔ Our trainers: FP&A working professionals

## FEATURES



### INSTRUCTOR-LED SESSIONS

20 hours of online live instructor-led classes  
Weekend class : 7 sessions of 3 hours each



### CERTIFICATION

Get 3 certifications in one course FP&A, Power Point presentation and advance excel. You can show them separately in resume



### EXPERT SUPPORT

Online support from our team for all your queries based on ticket based tracking system



### RESUME PREPARATION & JOB PORTAL UPDATION

Our expert will assist you in resume building and job portal updation



### REAL TIME CASE STUDIES

Live case studies for each financial topics to ensure that learner can understand it thoroughly



### LIFETIME ACCESS

You get lifetime access to the FINXL LMS which includes videos, excel spreadsheets, presentations, ebooks, quizzes and case studies



### ASSIGNMENTS

Each session will be followed by practical assignment



### FORUM

Our career square forum is the most dynamic platform to connect with expert across the globe

## WHAT IS FINANCIAL PLANNING & ANALYSIS

Financial planning and analysis (FP&A) is the budgeting, forecasting and analytical processes that support an organization's financial health and business strategy. The FP&A discipline combines in-depth analysis of both operational and financial data to help align business processes and strategies with financial goals, and to evaluate progress toward those goals.

## WHY FP&A TRAINING REQUIRED?

FP&A firms do not entertain freshers due to lack of practical exposure of Budgeting, Planning, Forecasting, Reporting & Analysis required for job. Skilled FP&A professionals demand are growing exponentially globally and consequently huge demand in outsourcing job market like India.

## APPLICATION



Investment  
Banking



Asset/Wealth  
Management



Corporate  
Finance



IT & ITES



Shared  
Services

## OUR RECRUITERS



**UBS**

CREDIT SUISSE



Deutsche Bank

**CITICORP**



**accenture**

Capgemini



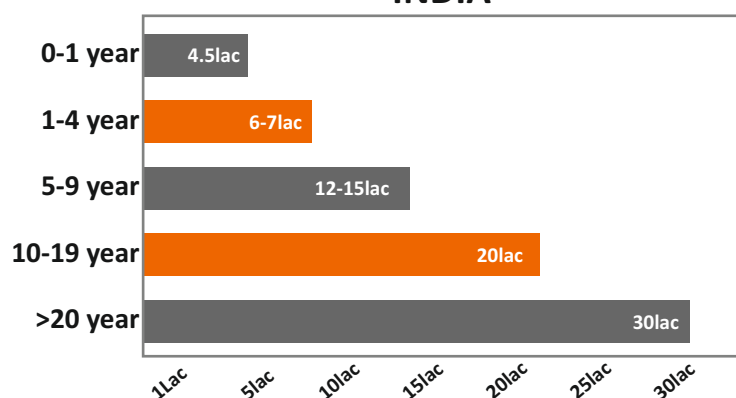
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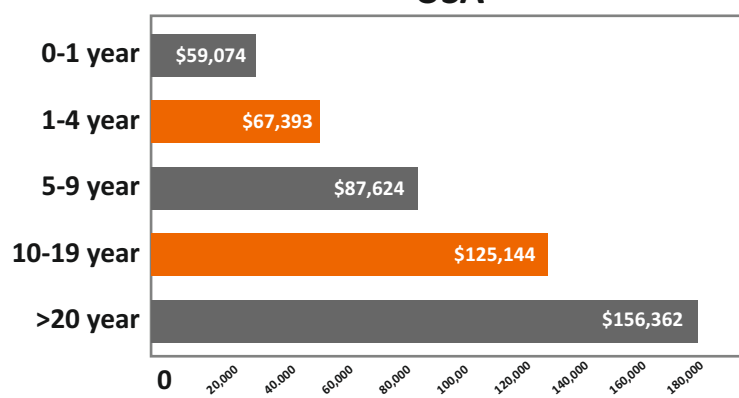
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## AVERAGE SALARIES

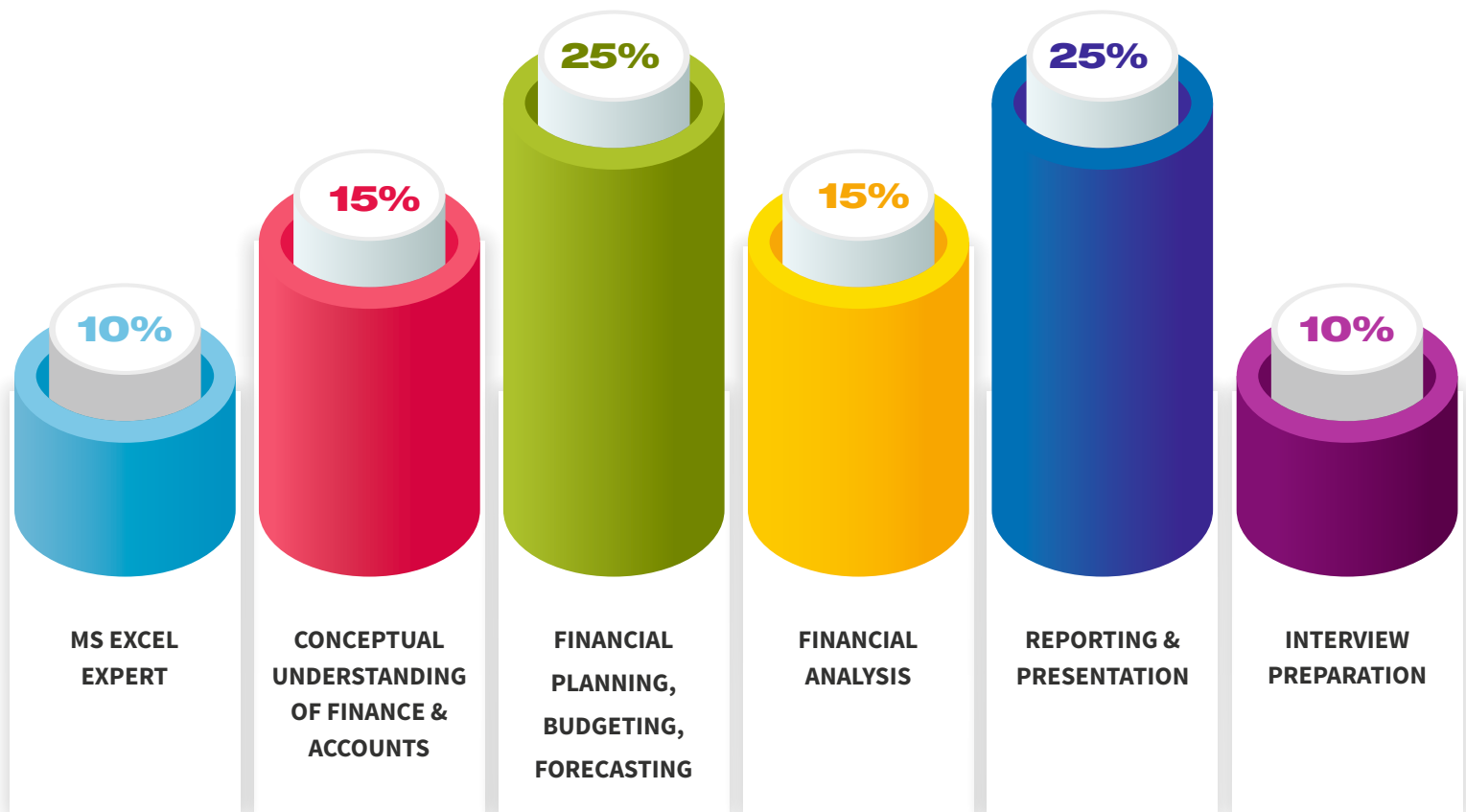
### INDIA



### USA



## WHAT YOU'LL LEARN



## WHO SHOULD TAKE THIS COURSE

Any graduates (pursuing/completed) MBAs, CFAs, FRMs, CAs, CPAs, ICWA, CSs, Operations/Back office professionals, Engineers(BE/ B.Tech), Financial Analysts, Business Analysts, Bankers, Financial Controllers, Corporate Treasury Managers, CFOs, CEOs, Fund Managers, PE Fund Managers.



## WHY FINXL

Corporate do not entertain fresher's due to lack of minimum practical exposure required on job. Hence here is how FINXL bridge the skill & experience gap and prepare you to be ready-made resource available for employer!!

## PRACTICAL & CASE STUDY BASED TRAINING

- ✔ Industry relevant content
- ✔ Case study based hands on training
- ✔ In-depth understanding of Finance fundamentals
- ✔ Trained by FP&A professional
- ✔ Individual progress measurement
- ✔ Live internship with Analytics firm
- ✔ One on one doubt-clearing sessions
- ✔ Life time access to FINXL LMS
- ✔ Connect FP&A professionals globally



## INTERVIEW SKILL TRAINING

- ✔ Mock interviews
- ✔ Frequently asked interview questions preparation
- ✔ Resume preparation
- ✔ Job portal updation
- ✔ Assertiveness and communication
- ✔ Financial Analysis, Reporting & presentation

## MARKET READY

- ✔ Frequent job updates
- ✔ Customized career guidance
- ✔ Soft skills workshop
- ✔ Skill set mapping
- ✔ Placement assistance
- ✔ Scheduling Interviews



## MODULE 1 : EXCEL EXPERT

- Excel Essentials & key board accelerators
- Basic & advance excel functions
- Conditional Formatting, Paste Special
- Using VLOOKUP/HLOOKUP/ Match Index
- Using SUMIF, COUNTIF, AND AVERAGEIF
- DATEDIF, YEAR, YEARFRACE & MONTH
- Index, Search, Choose, offset
- Sensitivity analysis with Data tables
- Pivot table, Charting commonly used
- Dashboards, templates, Macros

## MODULE 2 : FINANCE & ACCOUNTS CONCEPTS UNDERSTANDING

- Finance principles and processes (e.g., financial management concepts, corporate finance activities, etc.)
- General financial concepts and common financial formulas (e.g., time value, opportunity costs, debt structures and covenants, earnings per share, cost of capital, etc.)
- Financial accounting concepts, principles, and practices
- Interactions/interrelationships of common financial statements
- Basic micro-economics (e.g., marginal costs, pricing, price elasticity of supply and demand, etc.)
- Managerial accounting/reporting and cost accounting concepts

## MODULE 3.1 : PLANNING

- Getting Started with Financial Planning
- The Accounting Framework
- Financial modeling
- Corporate financial planning/strategic planning

### GATHERING AND INTERPRETING INFORMATION

- Sources of historical information and historical financial data and corporate structure and functions
- Sources of information about a company's business environment (e.g. business models, financial ratios, and industry metrics)
- Reading and interpreting corporate annual reports
- Determining peer groups and competitors
- Basic macro-economic concepts used in financial planning (e.g., consumer price index, gross domestic product, exchange rates, interest rates, inflation rates, economic indicators, etc.)
- Implications of tax policies on projections
- Risk factors and risk management concept
- Financial and non-financial key performance indicators
- Strategic planning concepts and frameworks
  - SWOT Analysis
  - Porter's five forces model
  - Growth share matrix
- Determining information needs of and gather information from internal/external stakeholders and business partners
- Tools for information gathering (e.g., templates, surveys, etc.)

### BUSINESS PLANNING

Concept of 3 and 5 year planning, concept of operational and sales plan including market forecast, production plan, sourcing plan and how various operations are inter-linked and aligned with the long term business plan

- Costs throughout the production process
- Fixed and variable costs
- Cost allocation
- Contribution margins

## MODULE 3.2 : FORECASTING

- Perform Top-Down and Bottom-up Forecasting
- Forecast a Company's Sales
- Forecast a Company's Planned Level of Production
- Calculate Net Cash Flow
- Forecast Various Types of Expenditures
- Estimate Working Capital Needs
- Carry out a Fixed Asset Roll forward
- Forecasting techniques (moving average, regression analysis, etc.)
- Essential Mechanics of the Forecasting Process
- Forecasting Selling, General & Administrative expenses
- Forecasting Balance Sheet Items

## MODULE 3.3 : BUDGETING

- Budgeting within a strategic framework
- Building a robust budgeting process
- Managing budget psychology
- A practical guide to developing budgets
- Common budgeting approaches (e.g. incremental, value-based, zero-based, etc.)
- Tracking budget performance with variance analysis (waterfall charts, etc.)
- Applied budgeting tools and techniques (Excel, solver, pivot tables, etc.)

### BUDGETING CONTROL

meaning and objectives of budget and budgetary control, essentials of effective budgeting, types of budget and budget vs. actual

### CAPITAL BUDGETING

Concept and process of capital budgeting, feasibility analysis, managing risk and certainty in capital budgeting, evaluation criteria under discounted and non-discounted cash flow approaches. Evaluate various investment decisions using appropriate tools and techniques and apply them to day to day business decisions.

## MODULE 4 : FINANCIAL ANALYSIS

Investment Decision making - Purpose, objective and process of investment decisions and evaluation of different types of project. New line of business, expansion of current product, backward/forward integration and application of effective financial management.

Analysis of balance sheet, apply appropriate measures for executing and evaluating the financial results to support managerial decision-making and setting strategies

## MODULE 5 : REPORTING & PRESENTATION

Corporate Financial Reporting - Attributes of good corporate financial reporting for performance analysis, understanding profit & loss items, reviewing the balance sheet, variance analysis, non-performing asset analysis, identifying the cause and taking appropriate action

### GLOBAL BANKING SPECIAL

- Special guide on Global Banking KPIs
- Basel III Financial structure (P&L account, balance sheet)
- Restructuring items/adjustment items & their treatments
- Additional information section
- Key performance Indicator (KPIs) – type of KPIs and its calculation & interpretation
- Regulatory reporting
- SEC reporting
- FINMA reporting
- MD&A (management discussion & analysis)
- Other external & internal reporting

## BUSINESS PROFESSIONALS

### SHAPE THE BUSINESS

Deciding on the future strategy of the business can be tough, especially when multiple variables and scenarios have to be taken into account. How should available funds be allocated?

Where to relocate production facilities? What Market should be entered? Our financial models bring structure into these complex questions and allow for a flexible assessment or ranking of all alternatives.

### RUN THE BUSINESS

Whether you are managing your business as usual or through a crisis, the achievement of targeted objectives is dependent on setting realistic forecasts, managing capital spending and ensuring cash and regulatory compliance. The supporting financial models should reflect the current business operations, have the ability to measure the impact of current or future changes in key drivers and must include monitoring capabilities.

### EXPAND OR DIVEST THE BUSINESS

When you are developing your business to implement future strategies and meet objectives, you will probably consider bringing together the right capabilities, assets and expertise through transactional activities. We can assist you with measuring the impact of synergy benefits or separation/ carve-outs and changes in capital structures on a typical deal. These models must be robust and include the ability to quickly test multiple scenarios and their associated impacts.

## EXAMPLES

### SHAPE THE BUSINESS

- Strategic options
- Scenario analysis
- Product/service development
- Product/service cost & profitability
- Pricing analysis
- Cost analysis
- Dashboards & scorecards
- Monte Carlo simulation

### RUN THE BUSINESS

- Capital spending
- Forecasting & reporting
- Regulatory reporting compliance
- Covenant modelling

### EXPAND OR DIVEST THE BUSINESS

- Acquisitions/disposals
- Mergers
- Debt restructuring

- Sensitivity analysis
- Model reviews
- Cash flow modelling & valuation
- Carve-out planning
- Carve-out tracking
- Accounting Separation
- Synergy planning
- Synergy tracking
- Integration modelling

## MODE OF LEARNING

### CLASSROOM

- ✔ 110+ Hours rigorous training
- ✔ Train by FP&A expert
- ✔ Active learning
- ✔ Small scale training batches
- ✔ Individual progress measurement & attention
- ✔ Learn at your own pace
- ✔ Real time case studies
- ✔ Practical approach
- ✔ Complementary eLearning for all participants
- ✔ Life time access to FINXL LMS
- ✔ Certificate of Completion

### ONLINE TRAINING

- ✔ 100 hrs Audio Video presentation on preparing Plan, Budgets, & designing Reports
- ✔ Flexible learning - Train anytime, anywhere
- ✔ Questions & answers forums
- ✔ Online reading material
- ✔ Financial Planning & Analysis, Reporting ebooks
- ✔ Financial Plan & Budget on start up & Mature companies
- ✔ Clear your doubts face to face with experts
- ✔ Certificate of Completion
- ✔ Connect with FP&A professionals globally

## CERTIFICATION PROCESS



## CERTIFICATION PROVIDED





## FREQUENTLY ASKED QUESTIONS

**Q1** Have already done /doing certain levels of FRM/CFA/MBA/CA. Should I enroll for this program?

**ANS** FRM/CFA/MBA/CA don't provide any live projects or train on Financial Planning, Budgeting, Forecasting, Reporting & Analysis. Also it does not provide any live applications on various REPORTS which are widely used and required in industry.

**Q2** All these content are available online. Why should I enroll for the program?

**ANS** In today's data age, all data is freely available online. It is not the problem of lack of access to information, but a problem of information overload that we deal with. This is just too much to grasp, and what is important gets lost in this flood of data available. We have carefully curated the content for your understanding, and created this program to help you focus on what is necessary for your preparation for these roles.

**Q3** This seems to be a high intensity program. Will I be able to cope up with it while having other engagements?

**ANS** It is indeed a high intensity program. However, the self paced nature allows us to customize the modules for your convenience. If you have specific engagements in college/your work, the program speed can be altered for those periods. However, this is still a rigorous program, meant for focused participants who intend to build a career in FP&A. These are competitive areas, and unless we are rigorous, the learning is not possible. So we do expect that participants will be able to put in the requisite effort and hard work. Helping you manage this time well is our concern, so rest assured, you can leave that to us

**Q4** What if I miss sessions?

**ANS** You will never miss a lecture at FINXL! You can choose either of the two options:

- View the recorded session of the class available in your LMS
- You can attend the missed session, in any other live batch

**Q5** What if I have queries after I complete this course?

**ANS** You get lifetime access to our Support Team who will help resolve your queries during and after the course

**Q6** How soon after signing up will I get access to the course content?

**ANS** After enrollment, you will get instant lifetime access to the LMS. You will be able to access the complete set of previous class recordings, presentations, PDFs, assignments, etc. Moreover, you will immediately get access to our support team so that you can start learning right away.



**Q7** Is the course material accessible to the students even after the course training is over?

**ANS** Yes! All learners get lifetime access to all course material once you have enrolled.

**Q8** What is the list of FINXL certificates?

**ANS**

- Financial modelling & Equity research
- Financial Planning & Analysis (FP&A)
- Investment Banking (IB)
- Equity Research
- HRAnalytics
- Excel Expert
- PowerPoint Presentation

**Q9** Is FINXL Certification worth it?

**ANS** The FINXL certification holds great value in today's job market. Having this in your resume can help open up lots of job opportunities for you. Financial Planning & Analysis certified professionals draw the best packages in the finance domain which is certainly a worthy investment for your career.

**Q10** How do i register for a course?

**ANS** You need to register online (enrol now)

**Q11** What are the payment options?

**ANS** You can pay by credit card, debit card, Google Pay, PhonePe, Paytm or net banking from all the leading banks.

**Q12** Do you provide placement assistance?

**ANS** You will get assistance from our expert on resume preparation and job portal updation. You just need to raise request in lms and our expert will connect with you within 24hrs.

FINXL does provide placement assistance. It depends on prevailing market conditions & candidate profile. We regularly send and arrange interviews for our candidates in different companies.

**NOTE:**

FINXL does not guarantee placements. Placements are at the discretion of management and candidates should not enroll with a sole view to seek employment opportunities through us

## TESTIMONIALS



One of the best decisions taken so far regarding my career, education and skill. Akhilesh sir and his training score merit on multiple fronts. Well-designed course with 100% career relevance with proper focus on learning method and basics with gradual but very structured upgrade in skill and proficiency level till true fundamental and functional expertise is reached. Sir push's each individual to his/her best self-performance levels.

Sir is relentless, humble at the same time truly committed to the purpose of making peoples life better with all that he can give.

**Rakesh Sharma**

FP&A LEAD, Eversana



Joining FP&A course from FINXL proved the best decision I have taken. I had 5 years of work experience in operations and wanted to switch from operations to corporate finance profile. That's why I joined FINXL FP&A course which helped me to get job in capgemini in core FP&A

**Nakul Sadu**

Sr Analyst, FP & A, Capgemini



It was a wonderful experience with FinXL. FinXL gave me a good knowledge of Financial analysis and also taught me how to implement it in various scenarios.

Along with the hands on experience on FPNA projects they provided me with a great Career direction. I am really happy being a FPNA certified by FinXL.

Also trainer helped in Resume building, Solutions to interview questions, placement assistance. I'm really satisfied with the outcome

**Tejas Disale**

Sr Analyst, FP & A, UBS



Thinking about professional class we think like class start on time and teacher come and taught what the that day plan, there is no concern about what student learn or not. But believe me after joining finxl you find all of your thought gone wrong. Here Akhilesh sir never gone forward unstill you learn that. He explain you 100 times.

Finxl is the best institute and Akhilesh sir is the best tutor in Pune for Financial Planning & Analysis (FP&A).

If you think about any of this course please go to finxl and you will definitely goes satisfied.

**Jitendra Wani**

Pricing and P&L analyst, CITCO





Great place to start your career in financial planning & analysis profile.  
Helps to upgrade your knowledge.  
Highly recommended!.

**Deepak Daryani**

FP&A MANAGER, VODAFONE



Best thing about Finxl:

1. Batch size is small which gives way to greater individual attention.
2. Akhilesh sir always makes us participate in the class, which most of us would not have done in school, college days.
3. The man is patient in explaining basic excel functions to advanced financial concepts.
4. Very patient in listening and clarifying the doubts which I had while building the model.
5. The best part for me in the whole program is the presentation which we're supposed to give at the end of the course. I made a model from scratch, wrote equity research report and presented in front of everyone. Those feedbacks from ppl are highly motivating and will surely help for my future!!

I am really thankful to Akhilesh sir for his immense support. Very fortunate to meet a mentor like him...!!

**Subramanian Kulathuran**

(US CFA)-Level 3



I worked with WNS, Avalara in operations. I was looking for jobs in FP&A. That's why I joined Finxl. I got selected in Syngenta Baner. Thanks a lot FINXL and Akhilesh for all your help.

**Ankita Lonkar**

Syngenta, Baner



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+91 96542 23403



**4.9/5.0**

Our reviews on **GOOGLE**



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## COSTING PLAN



**INR 40,000** (FOR CLASSROOM)



**INR 20,000** (ONLINE)

## COURSE DURATION FOR CLASSROOM TRAINING

### WEEKEND BATCH TIMING

**OPTION I** Saturday & Sunday (2 classes per weekend, 4 hours each) 3.5 Months (14 weeks), Intensive 110 hours

**OPTION II** Sunday (1 class per weekend, 7 hours each) 4 Months (16 weeks), Intensive 110 hours

### WEEKDAY-REGULAR BATCH TIMING

**2.5 Months (12 Weeks), Intensive 110 Hours**

## TRENDING COURSES

**Financial  
Modelling**

**Investment  
Banking**

**HR Analytics**

**Excel Expert**

**Power Point  
Presentation**

## REGISTRATION AND PAYMENT

For registration and inquiries, please email us at [info@finxl.in](mailto:info@finxl.in) or call us at +91 9158882688 / +91 9654223403.  
Registration will only be confirmed upon receipt of payment and registration form.

## CANCELLATION POLICY

Full payment must be made in one go and once you have the access to our course content and videos, no refund will be applicable.

### OTHER TERMS AND CONDITIONS:

Online training courses may not be transferred to another student.