




Financial Perspectives
Centre for Professional Excellence in
Advisory Competency and Ethics

A photograph of three business professionals in a meeting. A man in a dark suit is pointing at a document, while a woman in a white blazer looks on attentively. The background is a blurred office setting with a whiteboard covered in colorful sticky notes.

Fundamentals of Financial Analysis


Course Prospectus
**SME Masterclass
Series**

A portrait of a young man in a grey suit and striped tie, standing with his arms crossed. The background is a blurred office environment.

Program Overview

Through a combination of case studies, discussions, collaborative learning and mini lectures, this Masterclass facilitates the understanding of corporate financial statements and how to identify financial risks and mitigate them using insurance products.

Upon completion of this Masterclass, participants will understand how to apply the ECLAIR Framework for financial analysis and quantify the amount of insurance coverage that needs to be recommended to the SME owner to mitigate risk exposures such as credit exposure and debtor default. This Masterclass constitutes one of the core modules to attaining the CREDIBILITY™ Business Continuity Specialist Designation.



Course Objectives

At the end of this Masterclass, participants will:

1. Understand the working capital cycle and importance of maintaining adequate liquidity in business.
2. Understand what to look for in a financial statement to uncover potential risks
3. Understand how to conduct financial analysis and uncover risks using the ECLAIR framework,
4. Understand how insurance products can be used to mitigate financial risks and recommend suitable insurance products to mitigate them.



Total Training Hours

Upon completion of this program, participants will be awarded the Certificate of Completion and 4 non-core CPD Training Hours.



Who Should Attend?

Financial Planning Professionals, Bank Relationship Managers and Insurance Specialists, Insurance Agents



Course Fee

\$350 before GST



Funding

This program is IBF-FTS recognised and is eligible for funding under the IBF-FTS scheme.

Enquiry and Enrolment



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