



Consulting and Training | Reach New Heights

Course Name

Certified Corporate Financial Planning & Analysis Professional (FP&A) Preparation Course

Sector Name

Finance, Accounting and Banking

Document Type

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Certified Corporate Financial Planning & Analysis Professional (FP&A) Preparation Course

Course Introduction

Financial planning and analysis are vital to the decision-making activities in every organization. Leaders and the management as a whole need to have confidence in what the financial professionals are presenting in the company's budgets and forecasts.

AFP's Certified Corporate Financial Planning & Analysis Professional is a qualification that finance professionals must have in order to have the expertise needed to provide their organizations with reliable budgetary plans and forecasts. This certification is a two-part exam that is available online.

For professionals in the financial planning and analysis (FP&A) field, this training program will enable them to obtain an in-depth understanding of the complex processes, tools, and uniform standards, and gain the confidence they need to pass AFP's Certified Corporate FP&A Professional Exam.

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Target Audience

- ✓ Financial Analysts and Financial Planning Professionals
- ✓ Corporate Finance Managers and Directors
- ✓ Accounting Professionals Seeking Advanced Financial Analysis Skills
- ✓ Business Analysts Involved in Budgeting and Forecasting
- ✓ Professionals Pursuing Career Advancement in FP&A Roles

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Learning Objectives

- ✓ Gain a comprehensive understanding of the fundamental financial and microeconomic concepts and identify types of budgets
- ✓ Manage FP&A projects, processes, aligned people, and right-size the technology to deliver the FP&A services
- ✓ Determine proper sources for gathering information about the company and its industry, and apply the basic concepts of macroeconomics and strategic planning
- ✓ Create financial projections, evaluate capital expenditures and investments, and create what-if analysis
- ✓ Build and refine models, effective analysis of data, and use them in the planning process
- ✓ Perform financial analysis and variance analysis, and draw conclusions
- ✓ Use advanced spreadsheet functions, e.g., value lookup, pivot tables, macros, etc.
- ✓ Know how to leverage Business Intelligence (BI), Corporate Performance Management (CPM), Excel, and ERP systems to deliver a best-in-class FP&S function at your organization
- ✓ Recognize opportunities to increase the strategic value offered by the FP&A function in the organization

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Course Outline

✓ Day 01

Knowledge Domain A: Concepts of Business and Finance

- ✓ Types of short and long-range plans/ budgets/forecasts (zero-based budgets, annual budgets, rolling forecasts, etc.) and their application
- ✓ Interpreting corporate annual reports, including understanding the interactions/ interrelationships between common financial statements
- ✓ General finance principles and financial concepts, including common financial formulas (time value, opportunity costs, debt structures and covenants, earnings per share, cost of capital, etc.)
- ✓ Managerial accounting/reporting and cost accounting concepts (costs throughout the production process; fixed and variable costs; cost allocation; contribution margins; etc.)
- ✓ Financial accounting concepts, principles, and practices
- ✓ General business terminology, practices, and processes (compensation structures, performance management, stock options, etc.)
- ✓ Risk factors and risk management concepts (value at risk, hedging, insurance, interest rate risk, diversification, etc.)
- ✓ Concepts of cash management (working capital, financing options, etc.)
- ✓ Common financial investments/ decision types (go/no go; buy/lease; mergers, acquisitions, and divestitures; etc.)
- ✓ Frameworks to ensure quality business and strategic decisions (SWOT [strengths, weaknesses, opportunities, threats] analysis; Porter's five forces; growth-share matrix; root cause analysis; five whys; etc.)
- ✓ Basic microeconomics concepts (marginal costs, pricing, price elasticity of supply and demand, etc.)

- ✓ Basic macroeconomic concepts used in financial planning (consumer price index, gross domestic product, exchange rates, interest rates, inflation rates, economic indicators, etc.)

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Course Outline

✓ Day 02

Knowledge Domain B: Systems and Technology

- ✓ Using basic and advanced spreadsheet functions (financial functions, pivot tables, value lookups, macros, integration with other common software, etc.)
- ✓ The attributes/limitations of systems (business intelligence, enterprise resource planning, general ledger, etc.) for storing and providing access to financial data, including routine data and large data sets
- ✓ The ETL [extraction, transformation, and loading] process in data warehousing
- ✓ Basic data mining concepts and common algorithms (such as for data clustering)
- ✓ Information control concerns (internal governance, regulatory issues, accountability, information security standards, etc.)
- ✓ FP&A system testing process and tools (testing scripts, test plans, etc.)

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✓ Day 03

Knowledge Domain C: Business Partnering

- ✓ Creating and maintaining tools for information gathering (templates, surveys, etc.), including identifying and mitigating potential sources of bias
- ✓ Determining information needs of, and gather information from, internal/external stakeholders and business partners (operations, sales, and marketing departments; senior management; etc.)
- ✓ Identifying, monitoring and reporting business metrics (including financial and nonfinancial key performance indicators)
- ✓ Corporate structure/hierarchy and functions, including the roles and interrelationships between components of the financial structure (FP&A, accounting, investor relations, etc.)
- ✓ Relevant stakeholders for partnering
- ✓ Project management (establishing scope, mapping project/workflow elements, generating integrated timelines, managing interdependencies, monitoring progress, etc.)
- ✓ Corporate guidance (organizational goals, strategies, etc.) and its impact on planning/ projections
- ✓ Knowing when a situation requires intervention (stakeholder involvement, escalation, etc.)

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✓ Day 04

Knowledge Domain A: Analysis and Projections

- ✓ Create financial statement projections (income statement, cash flow statement, balance sheet, etc.)
- ✓ Create a capital expenditure/investment analysis (discounted cash flow analysis, return on investment projections, net present value projections, etc.)
- ✓ Create sales volume/revenue projections
- ✓ Create expense and headcount (staffing) projections
- ✓ Create specific customer/deal/product projections
- ✓ Perform a financial ratio analysis (debt/ equity, accounts receivable days, liquidity ratios, etc.)
- ✓ Perform competitive analysis (internal or external benchmarking; peer group analysis; ratios; etc.)
- ✓ Perform variance analysis and reporting (actual versus prior periods; actual versus plan; actual versus forecast; etc.)
- ✓ Conduct sensitivity analysis
- ✓ Conduct a financial risk analysis
- ✓ Create “what-if” scenarios

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✓ Day 05

Knowledge Domain B: Models and Analytics

- ✓ Conceptualize and scope an analysis (identifying tools and processes needed, conceiving efficient/effective model design, etc.)
- ✓ Develop assumptions, draw conclusions, and assess the reasonableness of assumptions/conclusions
- ✓ Determine and gather the information needed to complete a task (including knowledge of sources of pertinent and accurate information, both internal and external to the organization)
- ✓ The interrelationships between business drivers and account for their effects on financial statements
- ✓ Develop and evaluate alternatives for business decisions
- ✓ Common statistical concepts and perform common statistical calculations (standard deviation, expected value, correlation, regression, mean, mode, etc.)

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Confirmed Sessions

FROM	TO	DURATION	FEES	LOCATION
June 22, 2026	June 26, 2026	5 days	5950.00 \$	switzerland , Geneva
Feb. 1, 2027	Feb. 5, 2027	5 days	4250.00 \$	UAE , Dubai
Sept. 14, 2026	Sept. 18, 2026	5 days	4250.00 \$	UAE , Abu Dhabi
Oct. 26, 2026	Oct. 30, 2026	5 days	4250.00 \$	UAE , Dubai

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