



Consulting and Training | Reach New Heights

Course Name

MS Excel for Finance Professionals

Sector Name

Finance, Accounting and Banking

Document Type

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MS Excel for Finance Professionals

Course Introduction

Excel remains one of the most critical tools for finance professionals, yet its real value lies not in basic formulas, but in its ability to support financial analysis, planning, and decision-making. Many finance teams rely on Excel daily without fully utilizing its analytical and structural capabilities.

Developed by **Boost**, this course is designed to help finance professionals move beyond operational spreadsheets and use Excel as a professional financial analysis and reporting platform. The program focuses on structuring financial data, applying finance-relevant functions, performing analysis, and presenting insights clearly and accurately.

Boost's MS Excel for Finance Professionals - Intermediate course empowers participants to work smarter, faster, and more confidently with financial data.

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Target Audience

- ✓ Finance and accounting professionals
- ✓ Financial analysts and controllers
- ✓ Budgeting and planning teams
- ✓ Performance management professionals
- ✓ Professionals who use Excel for financial reporting and analysis

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Learning Objectives

- ✓ Organize and structure financial data efficiently in Excel
- ✓ Apply Excel functions commonly used in financial analysis
- ✓ Perform financial calculations and comparative analysis
- ✓ Analyze trends, variances, and financial drivers
- ✓ Build structured financial models and forecasts
- ✓ Present financial insights using clear reports and dashboards

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Course Outline

✓ DAY 01

Excel Foundations for Financial Work

Module 1: Structuring Financial Data in Excel

- ✓ Designing clean and logical worksheets
- ✓ Financial data consistency and accuracy
- ✓ Avoiding common spreadsheet design errors

Module 2: Core Excel Functions for Finance

- ✓ Logical and conditional functions
- ✓ Lookup and reference functions
- ✓ Error control in financial calculations

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Course Outline

✓ Day 02

Financial Calculations and Analysis

Module 3: Financial Calculations Using Excel

- ✓ Growth rates, margins, and ratios
- ✓ Time-based financial calculations
- ✓ Working with dates and periods

Module 4: Cost, Revenue, and Variance Analysis

- ✓ Cost and profitability analysis logic
- ✓ Budget vs. actual comparison
- ✓ Identifying financial performance drivers

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Course Outline

✓ Day 03

Advanced Analysis Techniques

Module 5: Pivot Tables for Financial Analysis

- ✓ Preparing data for pivot analysis
- ✓ Financial summaries and comparisons
- ✓ Dynamic reporting techniques

Module 6: Scenario and Sensitivity Analysis

- ✓ What-if analysis tools
- ✓ Scenario comparison models
- ✓ Supporting financial decision-making

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Course Outline

✓ Day 04

Financial Modeling and Forecasting

Module 7: Building Structured Financial Models

- ✓ Financial model architecture
- ✓ Separating inputs, calculations, and outputs
- ✓ Ensuring model clarity and reliability

Module 8: Budgeting and forecasting in Excel

- ✓ Budget and forecast structures
- ✓ Linking assumptions to results
- ✓ Updating and maintaining models

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Course Outline

✓ Day 05

Financial Reporting and Visualization

Module 9: Financial Reports and Dashboards

- ✓ Designing clear financial reports
- ✓ Using charts for financial insights
- ✓ Dashboard principles for finance users

Module 10: Excel Best Practices and Controls

- ✓ Spreadsheet documentation and controls
- ✓ Version management and review checks
- ✓ Improving efficiency and accuracy

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Confirmed Sessions

FROM	TO	DURATION	FEES	LOCATION
Feb. 1, 2027	Feb. 5, 2027	5 days	4950.00 \$	England , London
Aug. 30, 2027	Sept. 3, 2027	5 days	4250.00 \$	UAE , Dubai
Nov. 2, 2026	Nov. 6, 2026	5 days	4250.00 \$	UAE , Abu Dhabi
June 7, 2027	June 11, 2027	5 days	4250.00 \$	UAE , Abu Dhabi

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