COURSE SYLLABUS

Advanced Excel for Financial Modeling

Master the advanced Excel tricks, techniques, and tools financial analysts use to build and audit financial models. By the end of this course, you will know how to write efficient and flexible formulas, create sensitivity analysis, and master Excel's features for finance.

Group classes (Live Online) and onsite training are available for this course. For more information, email onsite@graduateschool.edu or visit: https://sdfm.graduateschool.edu/courses/excel-for-finance



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Course Outline

Advanced techniques to Expedite Workflow

Efficient formula writing
Formula & model auditing
Advanced cell locking
Hot Keys to work without the mouse
Windows & work with multiple applications
Go To Special
Paste Special

Project #1: Revenue build-up by store count and same store sales growth

Learn different methods for projecting company revenues
Apply advanced Excel techniques to quickly build out projections

Advanced Analytical Tools & Sensitivity Analysis

Goal Seek
Data Tables
Scenario Manager

Project #2: Cash flow modeling & sensitivity analysis

Project revenues and expenses
Discount cash flows to the present value
Run a sensitivity analysis for valuation based on revenue growth and gross margin

Database Functions for Finance

Advanced SUMIFS

VLOOKUP-MATCH

INDEX-MATCH

Functions for Financial Modeling

Financial functions

Date functions

Nested IF statements

IF Statements with AND/OR

CHOOSE function

Weighted average calculations

IFERROR

Projects #3: Loan amortization model

Model cash flows from an amortizing loan

Use advanced functions to aggregate the data