Advanced Excel for Financial Modeling and Forecasting Training Course

Professional Development Training Course Outline

Category	Public Financial Management & Budgeting	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In today’s fast-paced financial environment, professionals require advanced analytical and forecasting skills to drive accurate decision-making. Advanced Excel for Financial Modeling and Forecasting Training Course is designed to equip participants with cutting-edge Excel techniques, financial analysis tools, scenario modeling, sensitivity analysis, and forecasting strategies that empower organizations to achieve sustainable growth. Through hands-on training, real-world case studies, and practical simulations, learners will gain the expertise to develop dynamic models for risk management, corporate valuation, budgeting, and strategic planning.

This intensive program focuses on data-driven decision-making, advanced Excel formulas, pivot tables, Power Query, Monte Carlo simulation, regression analysis, and predictive analytics. Participants will explore industry-relevant best practices in financial modeling, forecasting accuracy, business intelligence, and scenario planning. By the end of this course, learners will be proficient in creating robust financial models that enhance transparency, efficiency, and confidence in financial decision-making processes.

Programme Curriculum

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Course Duration: 5 days

Course Objectives

By the end of the course, participants will be able to:

1. Apply advanced Excel functions for dynamic financial modeling.
2. Build scenario-based financial models for strategic forecasting.
3. Utilize data visualization tools to enhance financial reporting.
4. Conduct sensitivity and what-if analysis for risk management.
5. Design integrated financial statements using Excel.
6. Implement time series forecasting techniques for accuracy.
7. Apply Monte Carlo simulation for risk assessment.
8. Create valuation models for business decision-making.
9. Use Power Query and Power Pivot for advanced data analysis.
10. Apply regression and predictive analytics in forecasting.
11. Automate tasks with macros and VBA for financial modeling.
12. Strengthen decision-making through business intelligence tools.
13. Develop best practices for professional financial modeling.

Target Audiences

1. Financial Analysts
2. Accountants
3. Investment Bankers
4. Corporate Finance Professionals
5. Risk Managers
6. Business Consultants
7. Data Analysts
8. CFOs and Finance Leaders

Course Duration: 5 days

Course Modules

Module 1: Advanced Excel Functions for Financial Modeling

- Master advanced formulas: INDEX, MATCH, OFFSET, and arrays
- Use pivot tables and pivot charts for dynamic analysis
- Apply logical and statistical functions in modeling
- Error handling and auditing in Excel
- Practical exercises on dynamic reporting
- **Case Study: Building a sales forecasting model using advanced functions**

Module 2: Designing Integrated Financial Statements

- Construct income statement, balance sheet, and cash flow in Excel

- Link statements with dynamic formulas
- Apply circular references and iterative calculations
- Analyze working capital management
- Forecast financial statements with accuracy
- **Case Study: Developing a 3-statement financial model for a mid-size company**

Module 3: Scenario and Sensitivity Analysis

- Apply data tables for multiple scenarios
- Conduct what-if and goal seek analysis
- Build scenario manager models
- Perform break-even and risk analysis
- Apply stress testing techniques
- **Case Study: Scenario modeling for investment decision-making**

Module 4: Forecasting and Time Series Analysis

- Understand forecasting principles in finance
- Apply regression analysis for prediction
- Use exponential smoothing and moving averages
- Apply advanced forecasting techniques in Excel
- Evaluate forecasting accuracy with error metrics
- **Case Study: Time series forecasting for revenue growth**

Module 5: Monte Carlo Simulation and Risk Modeling

- Introduction to probability-based forecasting
- Apply random number generation in Excel
- Build Monte Carlo models for financial risk
- Interpret probability distributions and outcomes
- Enhance decision-making under uncertainty
- **Case Study: Monte Carlo simulation for portfolio risk assessment**

Module 6: Corporate Valuation and Decision-Making Models

- Understand valuation methods: DCF, multiples, and comparables
- Apply Excel models for company valuation
- Build leveraged buyout (LBO) models
- Apply sensitivity analysis in valuations
- Present valuation results for stakeholders
- **Case Study: Valuation modeling for a startup**

Module 7: Power Query, Power Pivot, and Business Intelligence

- Introduction to Power Query for data cleaning
- Apply Power Pivot for data modeling
- Create advanced dashboards with Power BI integration
- Manage large datasets efficiently
- Automate repetitive data processing
- **Case Study: Business intelligence dashboard for financial KPIs**

Module 8: Automation with Macros and VBA for Finance

- Introduction to macros for automation
- Write VBA scripts for financial models
- Automate repetitive reporting tasks

- Create interactive financial applications in Excel
- Apply error handling in VBA projects
- **Case Study: Automating monthly budget reporting with VBA**

Training Methodology

- Interactive lectures and guided demonstrations
- Hands-on practical Excel exercises
- Real-world financial modeling case studies
- Group discussions and peer-to-peer learning
- Personalized feedback and expert coaching

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com