



Executive Finance

Course Library: METADATA TO COPY TO YOUR MARKETING MATERIAL (individual courses listed first, passport bundles listed second)

Course title [copy to your catalogue]	Course description [copy if desired]	CPD	Direct URL link
Mastering Your Ethical Intelligence	This course is composed of four one modules in ethics. However, unlike most ethics' courses, we will not bore you with lectures on what not to do or the rules of professional conduct. This course will raise your awareness of ethical situations that are around you today that you aren't even thinking about. This course will change the way you make decisions and take actions. We will illustrate with numerous case studies that in the absence of ethical intelligence, otherwise good people are highly susceptible to making poor judgments. If that is still not enough to consider this for enrollment, how about this - ethical intelligence has been proven to improve corporate performance! You can get all 4 hours of your Ethics PD requirements in this one course.	4	https://executivefinance.teachable.com/p/ethical-intelligence
The Principles of Ethical Leadership	Many financial professionals face a continuous barrage of challenges. Seeing your way through these challenges and succeeding in the face of adversity is resilience—one of the six traits of executive presence. This course is designed to grow the confidence, ambition, and strategic influencing skills of high potential financial professionals in business. In this course, you will learn how to recruit, retain, and develop a strong team of financial professionals increasing the capabilities and capacity of the finance function to support the business. You will learn the approaches raising and protecting the level of financial credibility, allowing conversations to focus on the implications of numbers and less on the numbers themselves.	4	https://executivefinance.teachable.com/p/ethical-leadership

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Financial Intelligence for Entrepreneurs, Executives and Directors	Great entrepreneurs, executives and directors know when they are talking dollars, they are making sense. In this course, you will learn to look at financial statements through the eyes of a seasoned executive. You will learn how to probe into issues of performance and identify root cause. You will learn to rise above the preparation aspects of accounting and finance that bog down many new financial professionals and scare most non-financial professionals. The insights will help you negotiate your next financing or make your next investment decision. Regardless of whether you have a financial background or not, you will benefit from taking this course to hone your financial intelligence.	4	https://executivefinance.teachable.com/p/financial-intelligence
6ExY: Mastering the Six Traits of Executive You	Few financial professionals even consider the importance of building their executive presence and then they wonder why they don't have a seat or a voice at the executive boardroom table. In this series of 6 modules, you will learn how to elevate your own executive presence and achieve high levels of influence, leadership and make a strategic contribution inside your organization.	5	https://executivefinance.teachable.com/p/six-traits-of-executive-you

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TGIF: Transform Grow Innovate in Finance	This is a course in finance transformation. In fact, it's more than a course, it's a guided journey of self-evaluation, reflection and strategic planning to propel your finance organization forward. Not only are organizations under fire to keep up with internal and external forces that require adaptation and change, so are the finance functions that support the organization. The modern finance function has never had as great an opportunity as it has today to play a strategic advisory role inside any organization. Yet, most finance leaders and those working in the finance organization find themselves still buried in transactional processing. This course shares with you a path bridging these two states.	4 (sell as 4 or 3.5)	https://executivefinance.teachable.com/p/tgif
5 Ways COVID- 19 Will Forever Change Our Risk Thinking	COVID 19 has in a very short time changed the way we do business and think about risk, resilience, and disaster planning. The lessons are being written each day as we live through this global pandemic. The role of the CPA has been front and center since the crisis hit and continues to be of integral importance if organizations are to survive. Few organizations are unscathed, many are crippled, and handful are pivoting to not only survive the crisis, but also emerge stronger. In this webinar we will explore five newly minted ways to think about risk management in this dynamic period of human history	1	https://executivefinance.teachable.com/p/5-ways-covid-19-will-forever-change-our-risk-thinking
Financial Modeling Using Excel	In this course we are going learn how to financially model a business using Excel. Financial models underpin strategic and business planning, solicitations for financing, budgeting and forecasting, business valuations, cash budgeting, capital budgeting, and so many other corporate finance purposes. In this course, we are going to concentrate on the preparation of a financial projection of the income statement, balance sheet and statement of cash flow. We will use an approach that keeps model integrity and credibility top of mind throughout development.	1.5	https://executivefinance.teachable.com/p/envision-the-future-financial-modeling-using-excel

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Fraud in the Workplace	<p>In this course we are going to tackle a topic that doesn't factor into many senior financial leader's agendas all that often or until something happens, that is, fraud in the workplace. Occupational fraud is a giant global industry. Organizations are losing an estimated 5% of revenues to employee fraud each year according to the experts at the Association of Certified Fraud Examiners (ACFE). Does that statistic shock you? Are you in disbelief that the number could be so high? In this course, we are going to discuss how employees are doing it, how we can detect it, and most importantly, what can be done to prevent it in the first place. We will use the research of the ACFE to look at the fraud cases under investigation to reach a deeper understanding of this issue. You will be astounded, you may be surprised, but the goal of this course is to make you enlightened.</p>	1	https://executivefinance.teachable.com/p/fraud-in-the-workplace
Rethinking the Boardroom: Make Your Board a Point of Competitive Advantage	<p>This course will provide participants with a look behind the boardroom doors to evaluate the effectiveness of corporate governance systems. Today's corporate directors, and the executive teams with whom they work, are being challenged by the owners of the organization more so than ever to not only protect their interests, but also enhance corporate performance. As boards already struggle to balance the growing list of regulatory compliance requirements, we are going to identify and explore three key board leadership roles that differentiate good boards from great ones. We will look at ways the Board can make valuable contributions to value creation and long-term viability by achieving what we will describe during the course as Governance Advantage.</p>	1.5	https://executivefinance.teachable.com/p/behind-boardroom-doors

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Powerful PowerPoint Presentations	This is a course about how to use PowerPoint. The course not only covers the features of PowerPoint, but more importantly how to use the features to create presentations that stand apart and engage the audience. In this course we will learn how to use PowerPoint as an effective visual aid to supplement any presentation. We will discuss how PowerPoint can be used to create our own graphics and customize imagery to share our ideas visually with our audience.	1.5	https://executivefinance.teachable.com/p/powerful-powerpoint-presentations
Presentation Skills for Finance Professionals and Executives that Make an Impact	In this course we are going learn how to deliver an inspired presentation. Finance professionals and executives are being called on more and more to deliver presentations inside and outside the organization. How you deliver these presentations is ultimately a reflection of your executive presence. In this course, you will learn how to plan and organize your presentation; how to tell your message in a way that your audience will remember it and act up on it; and how to deliver your presentation with poise and confidence. Leadership is a key attribute of the modern finance executive and being a successful leader in part hinges on your ability to communicate your ideas in a way that people will follow. This course has been tailor made for you as a financial professional working in today's business world.	1.5	https://executivefinance.teachable.com/p/presentation-skills

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Your First 100 Days as CFO	In this course we are going to look at getting started in a new CFO role. Whether this is your first appointment as CFO or perhaps you are transitioning to a new CFO role at another organization, we will look at different approaches for your first 100 days. We begin with a profile of the modern CFO, that is, what you need to bring to the organization. From there, we will look at team building principles and using proven tools to help you assess the existing finance function against best practices. We will use a strategic approach to developing an overarching mission and value statement for finance to bring context to specific action plans. We will look at structuring the finance function within the organization context to optimize and balance responsiveness to stakeholders with the need for control. Finally, we will look at change management principles to help you initiate your first major project.	1.5	https://executivefinance.teachable.com/p/100-days
Capital Budgeting: Analysis that Improves Long-term ROI	This is a course in establishing a capital budgeting process from conducting due diligence through to communicating and facilitating discussions of capital investment opportunities with decision makers. Capital budgeting is a key strategic process that ensures capital is deployed to only those opportunities that have a high probability of meeting or exceeding the expectations for return. It is also a process that ensures that scarce capital resources are deployed to the highest yield opportunities across the organization.	1	https://executivefinance.teachable.com/p/capital-budgeting

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Master Capital Allocation	In this course we are going to tackle capital allocation, that is, how the CEO, and you as CFO and their strategic partner, go about deploying cash inside the business. CEO's are ultimately measured on their record of generating returns for their shareholders. The single most important determinant of shareholder returns is capital allocation. Knowing what tools, you have available and when to use them is the key. We'll look how and when you source cash. We'll also look at the strategies behind selecting the most optimal use of that cash, which may include buying back shares in yourself.	1.5	https://executivefinance.teachable.com/p/master-capital-allocation
Best Practices for a Quicker Financial Close	The pressure on the finance function has never been higher to deliver financial results as soon as possible after the period. Managers, analysts, Boards, and investors are digesting market information in real time and are beginning to expect the same of financial results. To meet these high expectations, the CFO and controller need to find ways to speed up their financial close processes to report the financial results before they become perceived as old news in the new world. In this course, Blair Cook, a many-time CFO, will explore ideas for shortening the financial close process. Leading companies have found ways to close their books in as little as one day and see the benefit of almost real-time analysis (in addition to the actual period financial data) that can be performed with a shorter close.	1	https://executivefinance.teachable.com/p/fast-close
Best Business Practices After Living Through A Global Pandemic	2020 was a year to forget, but not so fast. While tragic is so many ways-loss of livelihoods, personal sacrifice, loss of life-there were also so many lessons learned. There were also many tales of amazing resilience and creative inspiration. These are the memories, the best practices, and the growth mindset we want to hold onto from this experience. In this course, you will learn how the Covid pandemic forever changed our working lives.	1	https://executivefinance.teachable.com/p/business-after-covid

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Thinking and Acting Strategically as CFO	Are you working in finance and want to play a larger role in the strategy development process of your organization? Perhaps you see an opportunity to formalize strategy development and execution but aren't quite sure how to go about it? This is a course in strategic management. A course that is going to cover all of the important topics of strategic management from developing mission, vision, and values; to conducting situational analysis; to formulating strategy; to executing strategy. The course ties each of the strategic management phases together with facilitation tools and techniques that will allow the learner to make a valuable strategic contribution to their organization.	1	https://executivefinance.teachable.com/p/corporate-strategy
Financial Analysis: Reading Financial Statements like A Pro	In this course, we will work through a set of financial statements highlighting the key points of relevance. We will also learn about ratio analysis, which will help us generate a deeper level of insight into the financial results by making comparisons to prior periods and to peers. This is a foundational course that will deepen your understanding of what the numbers mean.	1.5	https://executivefinance.teachable.com/p/financial-analysis
ERP - What Every CFO Should Know About Implementing a New ERP	In this course, Jennifer Nicholson, a many-time CFO, who has recently gone through implementing a new ERP system shares with you her own insights and experience with the ERP implementation process. Whether you have begun already, are just beginning, or merely contemplating a change to your systems, this course will guide you through all the relevant stages of the implementation process.	1	https://executivefinance.teachable.com/p/erp

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Change Management: Being A Catalyst CFO	In this course we are going to look at change from all perspectives. From what sorts of corporate initiatives require careful consideration of change management principles, to the challenges of implementing change. We look at change from the perspective of the employee, after all, it's they for whom we need to change for the organization to be successful. And we develop an approach to enable that to happen successfully. Finally, we will look at way that organizations are adapting to continuous change by changing aspects of their organizational structure.	1.5	https://executivefinance.teachable.com/p/managing-change
Financing Strategy: Tips for Sourcing Capital	In this course you are going to learn about the financing strategies for your business throughout its lifecycle. You will learn about all the various debt and equity financing arrangements at an application-based level. In the debt sections of the course, you will learn about how operating lines of credit works and what to watch out for. We will also talk about asset-based lending facilities, term loans, and leasing. Mezzanine financing is an increasingly popular way of replacing equity financing with hybrid financial instruments. In the equity sections of the course, you will learn about venture capital, private equity, and the process of going public. Finally, you will learn about how cost of capital and capital structure factor into your strategic thinking and decision making.	1.5	https://executivefinance.teachable.com/p/financing-strategy

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The Credible CFO: Driving Growth & Delivering Predictability	In this course, we will look at the credibility of the CFO and of the finance function. We will discuss how we assess credibility as well as the factors that erode and build credibility. Credibility is the foundation for finance's position in supporting a growth mandate. Credible CFO's position themselves as strategic leaders as they master execution of the existing business and develop visibility of future financial results. The ability to deliver predictability helps the executive and the board of directors formulate and execute strategic plans with greater confidence. We will explore strategies that the CFO should be considering enhancing their own credibility as well as that of their team using tools and technology.	1	https://executivefinance.teachable.com/p/credible-cfo
Ethical & Audit Considerations of Cryptocurrency	Cryptocurrencies, such as Bitcoin and Ethereum, are just two of thousands of emerging solutions to create frictionless global transactions between counterparties. Additionally, cryptocurrencies are positioning themselves to become the "new gold" of the modern world as a store of value and immune from geo-political risk. The rise and fall of cryptocurrency prices have not deterred interest in the technology or the space, but is leading to every more practical, accessible and useful application of blockchain technology. This course uses several case studies to illustrate the audit and ethical considerations in the newly emerging sector. Few accountants and auditors are conversant with cryptocurrency technology and this course is designed to improve your level of awareness and deepen your understanding of issues associated with issuing an audit opinion for clients in this space.	1.5	https://executivefinance.teachable.com/p/ethical-audit-considerations-of-cryptocurrency
Learn Accounting in 1 Hour	This course is for aspiring accountant or finance people who want to improve their understanding of how accounting works. This course packs into one hour the best of what you need to know to perform accounting. Along the way, I'll show you tips and techniques to make sure you stay on track and your books balance. I will teach you how to prepare financial	1	https://executivefinance.teachable.com/p/learn-accounting-in-1-hour

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	statements using a simple conceptual model that can apply to any organization small or large.		
Corporate Finance Principles	This course will take a practical approach to considering how finance theory is applied in the business world. The course covers many of the key principles that embody corporate finance and gives participants a comprehensive appreciation of the finance discipline. Whether you are aspiring for a career in finance or looking to round out your appreciation of the financial concepts, this course is designed to cover off such topics as financial analysis, forecasting, present value, future value, rate of return, use of debt leverage, and risk management, including derivative instruments.	1.5	https://executivefinance.teachable.com/p/corporate-finance
Risk Management	This course designed to give the student an overview of the COSO Enterprise Risk Management framework. These simple lessons will walk each stage in the framework and explain in plain terms what is involved and what should be considered.	0.5	https://executivefinance.teachable.com/p/risk-management
Financial Statement Auditing	Many organizations are audited by independent public accountants. The purpose of an audit is to express an opinion on the fairness of presentation of financial information prepared by management. An audit enhances the value of financial information by making it more trustworthy and credible. In this multi-part course, we are going to learn how public accountants plan and execute an audit. This course provides complete coverage of most university level financial auditing courses.	4	https://executivefinance.teachable.com/p/auditing-financing-statements
Competency Mapping in the Office of the CFO	The success of every finance function hinges on the competency of its employees. All the best financial technology and processes that money can buy will not be enough to overcome a deficiency in people. Companies that use competency assessment enjoy lower employee turnover, higher employee performance and increased sales and profits. A competency assessment framework will improve self-	1	https://executivefinance.teachable.com/p/competency-mapping

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	managing your own career and/or manage your finance team more effective.		

PASSPORT BUNDLES: (Use these if you want to incorporate into your 3.5 or 7.0 CPD Passport

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Passport: Mastering Corporate Finance Analysis	In this bundle of courses, you will learn to master the principles under pinning corporate finance. You will learn to analyze financial statements like a pro. You will learn the principles of corporate finance including present value, future value, leverage and risk management. You will then go on to learn how to build financial models in Excel followed by how to structure financing strategy using different types of capital. And finally, you will learn how to use financial analysis to make capital budgeting decisions incorporating risk management analysis.	7	https://executivefinance.teachable.com/p/mastering-corporate-finance
Passport: Presentation Skills for Accounting and Finance Professionals	In this bundle of courses, you learn to present like a pro. You'll learn that presentations are intended to persuade and influence. You'll learn handy tips to engage your audience. We will cover how to use PowerPoint as the visual aid it was always intended to be to help you tell your story.	3.5	https://executivefinance.teachable.com/p/bundle-presentation-skills
Passport: Strategic CFO Leadership Program	In this bundle of courses, you will learn to move beyond the accounting and processing side of the finance function and become forward looking and strategic. The bundle includes your first 100 day as CFO and assessing the situation. It includes making a strategic contribution by teaching you strategic planning techniques. You'll learn about capital allocation and its importance in achieving long term return and sustainability. You look at financing strategy and explore the different sources of raising capital. And finally, you'll do a deep dive into change management and getting major initiatives done using people.	7	https://executivefinance.teachable.com/p/strategic-cfo-leadership-program

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6ExY: Mastering the Six Traits of Executive You	Few financial professionals even consider the importance of building their executive presence and then they wonder why they don't have a seat or a voice at the executive boardroom table. In this series of 6 modules, you will learn how to elevate your own executive presence and achieve high levels of influence, leadership and make a strategic contribution inside your organization.	5 (sell as 3.5)	https://executivefinance.teachable.com/p/six-traits-of-executive-you
TGIF: Transform Grow Innovate in Finance	This is a course in finance transformation. In fact, it's more than a course, it's a guided journey of self-evaluation, reflection and strategic planning to propel your finance organization forward. Not only are organizations under fire to keep up with internal and external forces that require adaptation and change, so to are the finance functions that support the organization. The modern finance function has never had as great an opportunity as it has today to play a strategic advisory role inside any organization. Yet, most finance leaders and those working in the finance organization find themselves still buried in transactional processing. This course shares with you a path bridging these two states.	4 (sell as 4 or 3.5)	https://executivefinance.teachable.com/p/tgif

SCHEDULE B: PROFESIONAL BIOS



Blair Cook CPA, CA CPA (III) MBA

Blair is a many-time corporate director, CFO, author, speaker, educator, innovator, and thought leader. His educational videos of accounting and finance have millions of views on YouTube. He has keynoted and spoken at national conferences from New York to Toronto. Along with Jen, he co-hosts CPA Canada's podcast series "CPA Success Podcast." He works with real businesses to experiment with theories and practices developed both in the academic and real world. He then shares these experiences and stories with others of what works, what doesn't, and what was learned. He is the author of *The Illiterate Executive: An Executive's Handbook for Mastering Financial Acumen*.



Jennifer Ross Nicholson CPA, CA

Jen is a dynamic financial professional with over 20 years of leadership experience in public practice, academia and industry. Jen is the co-host of CPA Canada’s podcast series “CPA Success Podcast.” Jen brings to the classroom a broad skill set and experience in all key facets of an organization including operations management, strategic planning, business development, finance, accounting, investor relations, human resources, and project management. Jen has a passion for making finance more attainable, whether it’s working to articulate strategy in a financial context, bringing clarity to financial communication or teaching accounting to university students. Jen’s career epitomizes the diverse experiences and roles that CPAs play in industry – from financial to operational leadership.

SCHEDULE C: Email to Members Upon Registration (Adjust as necessary)

(Feel free to edit as necessary, this is just a suggestion)

YOU ARE REGISTERED!

Welcome to the e-Learning offering of **ON DEMAND – [COURSE NAME]**.

To access your course, click the following link:

[INSERT 'AUTOMATIC ENROLLMENT LINK' from Column B of respective course]

You will be asked to provide your name and email, which is necessary so that you can be sent a notification of course completion.

Didn't work?

Note that your Course Link and Coupon Code are:

Course Homepage: [Provided above for each course in Schedule A]

Coupon Code: [INSERT 'COUPON CODE' column A from Excel file of coupon codes]

You can apply the coupon code by visiting the course homepage

1. Enroll using Canadian Dollar Pricing
2. Look for the "Apply Coupon" button right below the price
3. Copy/Page your unique coupon code: [INSERT COUPON CODE]
4. Provide your name and email for course completion notification.

Still can't enroll or having any technical issues with the course?

Contact info@executivefinance.ca for technical support.

CPD REPORTING

- Participants will automatically receive an email notification of completion which should be kept for evidence of course completion.
- CPD Reporting information and requirements are outlined at [insert link to provincial CPA CPD requirements]