Welcome to Executive Finance!

We are Blair Cook CPA, CA CPA (Ill) MBA and Jen Nicholson CPA, CA. We are both many-time CFOs and corporate directors working across diverse industries. We also happen to both possess a passionate interest and extensive background in professional and post-secondary education.

Our **passion** and our **mission** is *to develop and deliver professional development that engages and educates financial professionals to meaningfully improve workplace performance*.

Our PD offerings deliver on this mission by:

- **Surveying** the latest thought leadership supplemented with our own thinking and experiences on topics of interest and importance to financial professionals.
- **Engaging** our audience to actively participate in their own learning and development using interactive cases and peer discussions.
- **Providing tools and methodology** that participants take away from the course and apply in their everyday workplace.

In short, we both strive to develop and deliver professional development for your members that stands out and gets remembered. Read on to learn more about us and the proprietary courses, programs, webinars, and concurrent sessions we have developed with financial professionals in mind.

We are easy to work with and flexible in our arrangements. We are currently working with five Canadian provincial CPA institutes to deliver one or more of the programs described in this brochure. We'd love to help you in supplementing your professional developing offerings.

Thank you and hoping we can work together in 2016-17!

Blair and Jen

For more information visit: www.ExecutiveFinance.ca

Contact: Blair@ExecutiveFinance.ca 902 401 5237

Jen@ExecutiveFinance.ca 902 223 0461

Professional Bios

Blair Cook CPA, CA CPA (Ill) MBA

Blair is a many-time corporate director, CFO, educator, innovator, thought leader, presenter, and curiosity generalist. As an academic-practitioner, he's a perpetual learner who observes and experiments with various financial and management theories in real world context. He shares stories of his successes, failures, and lessons learned to all those who share a passion for further developing their own financial leadership qualities. His focus is on defining and developing a career path for financial professionals aspiring to the Office of the CFO and the Board of Directors. Blair has worked extensively with CPA Canada in recent years to design, develop, and launch the professional certification program.

Jennifer Nicholson CPA, CA

Jen is a dynamic, versatile financial professional with over 20 years of leadership experience. 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 its working to articulate strategy in a financial context or bringing clarity to financial communication. Jen's career epitomizes the diverse experiences and roles that CPAs play in industry – from financial to operational leadership.

An Overview of Professional Development Offerings

Program/Course/Workshop	Duration	Presenters
Today's CFO Tomorrow Leadership Development: Embody the Modern Role of CFO	**2 days CPD Program**	**Blair &/or Jen**
Behind Board Room Doors: Become a More Effective Executive/Director	**1 day CPD Course**	**Blair &/or Jen**
Develop and Deliver Powerful Financial Presentations	**1 day CPD Workshop**	**Blair &/or Jen**
Develop Your People and Learn to Create Your Own Finance Training Program	**1 day CPD Workshop**	**Blair &/or Jen**
Webinars, concurrent sessions, moderation, and keynotes	Typically 45 minutes to 90 minutes	Blair &/or Jen

Blair and Jen both have extensive experience presenting courses available through the CPA Canada National Database and we are happy to discuss further should you have a need for a presenter. Blair regularly delivers the following nationally developed courses for various provincial CPA institutes:

- **Partner in Business: Controller Essentials**
- **Financing Strategies**

Pricing:

Our pricing structure is entirely negotiable and generally varies (slightly) depending on the distance we have to travel to deliver the professional development. We will happily find a rate that meet your needs and ours. We are very conscious of helping you meet your economic objectives for the delivery professional development, including controlling both the presentation fee and the travel expenses.

Joint presentations opportunities:

In 2016, we are experimenting with co-presenting as one idea for delivering professional development courses that stand out - both from a marketing and participant experience perspective.

Recognizing that this impacts our client's economics [i.e. having us both present for a session], we are open to structuring these sorts of sessions using a contingent fee arrangement based on course attendance. For example, charging a single presentation fee for a minimum number of participants, plus a variable fee for participants above the minimum. Our goal would be to preserve or enhance your economics for professional development to your members, but to offer something that is new, different, and stands out for your members. This is ***entirely optional*** *and just an idea that we are exploring for 2016 to see if it helps you attract more participation to your offerings. We are happy to discuss more if this is of interest. As always, our engagement can be cancelled or modified at anytime prior to booking our travel to make it less risky for you.*

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Program: Today's CFO Tomorrow Leadership Development: Embody the Role of the Modern CFO

Abstract:

This two-day program blends a mix of hands-on learning activities with presentations of some of the latest thinking and research on various executive competencies for those aspiring or residing in the office of the CFO. The modern CFO is increasingly making strategic and leadership contributions, without losing any focus on the financial and management reporting roles they already embody. Get first hand experience role-playing as CFO of a fast growing company. In doing so, you will experience, feel, and learn first hand how to work through challenging situations that go beyond financial and technical skills.

Who Should Attend:

Financial professionals who have achieved or aspire to achieve leadership roles in the finance function of their organization.

Presenter(s):

Blair and/or Jen are both seasoned CFO's working across diverse industries and businesses. They are both thought leaders specializing the matters of interest and importance to the Office of the CFO.

Topic Outline:

1. Understanding the competencies of the modern CFO
2. The first 100 days as CFO
3. The CFO's role in facilitating development of strategy and execution
4. Managing risk to deliver on strategic objectives
5. Helping the Board and the Audit Committee meet their fiduciary responsibilities
6. Capital allocation: the highest purpose of the CEO and CFO?
7. Building a finance function and developing a highly productive team
8. Managing change without stressing out the organization
9. Business process improvement
10. Delivering killer presentations
11. Protecting the organization from occupational fraud

Recent testimonials:

- *"Very effective presenter. Group work was very beneficial in relaying topics discussed."*
- *"Highly energetic, motivated leader."*
- *"Great at keeping people interested and mixing professional with interesting."*
- *"The material coupled with the real-life, relevant examples provided by the instructor go a long way in helping with CFO leadership and decision making development."*

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Course: Behind Boardroom Doors: Become a More Effective Executive/Director

Abstract:

This one-day course uses a blend of case-based learning with presentations of thought leadership on achieving governance excellence in any organization - be it in a non-profit, government, private, or public entity. Learn how the boardroom functions and become a more effective director and/or executive supporting a Board of Directors. A strong Board of Directors presents any organization with the opportunity to achieve a point of competitive differentiation, yet sadly, the reality is just the opposite - boards that are overly cautious and caught up in the semantics of governing. Executives and directors should be working cooperatively to maximize the contribution of their board and individual directors. These collective talents can meaningfully improve strategic management, leadership development, and organizational performance.

Who Should Attend:

The target audience for this course includes: senior financial professionals, directors, and executives who serve on or for a Boards of Directors.

Presenter(s):

Blair is a many-time Corporate Director serving on the boards of a number of Canadian public companies and non-profit organizations. He has also fulfilled the CFO role in public and private companies with governing Boards of Directors.

Jen serves on numerous non-profit and private company organizations and experienced first-hand the challenges of maximizing the contribution of a group of peers. Jen is a passionate community leader and tireless advocate that is as comfortable working at the front lines of soup kitchen as she is playing a governing role in the boardroom of organizations to whom she dedicates her time.

Topics Outline:

- Constitution of the Board and the roles of directors and management
- The 4 board leadership roles of Governance Advantage
    - The RECRUITER: Getting the right people involved
    - The CONDUCTOR: Discussing what matters
    - The INFORMER: Communicating what matters
    - The FACILITATOR: Deciding on what matters
- The Board’s role in strategic and risk management
- The Board’s role in leadership development and succession planning
- The Board’s role in making capital allocation decisions

This course is currently being delivered in Nova Scotia, PEI, and Manitoba.

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Workshop: Develop and Deliver Powerful Financial Presentations

Abstract:

In almost every survey of executive skills most lacking in the finance function of today's organizations are those all-important presentation and communication skills. Let's face it, financial professionals are confronted with unique challenges of communicating vast quantities of complex information, which unfortunately, may not be as exciting to others as it is to us in finance. It does not have to be this way. By the end of this course, you will have command of the tools, knowledge of the principles, and tips to make your next presentation as engaging and memorable as any TED Talk. This will be a hands on workshop where you will learn how to maximize the use of PowerPoint as the visual aid it was always intended to be. Participants should bring their laptop to this event.

Who Should Attend:

Any financial professional who want to greatly enhance their ability to communicate and present across of broad audience.

Presenter(s):

Blair and/or Jen are both professional presenters who have done the research into what makes for an effective presentation. They've taken this research an applied it to the challenges of finance.

Topics Outline:

- Principles of persuasion
- Structuring presentations
- Making presentations engaging and improving retention
- Story telling and its importance
- How to present with confidence and poise
- Beyond PowerPoint 101
- Building PowerPoint visual aids that amplify your message
- Fancy PowerPoint features that WOW!
- Developing your 60 second elevator pitch

This course is currently the top selling course at Proformative.com!

- *"Blair has jam-packed this presentation on Developing Killer Presentation Skills for Finance Executives with first class ideas and extremely valuable tips and techniques. This is a MUST course for anyone interested in furthering their career who gives or aspires to give effective presentations, regardless of the setting. Thanks Blair for a lively, entertaining, informative and skilled course. I only wish I had taken this program long before now!"*
- *"Rockstar quality! This course adds a number of concepts I can use for financial presentations."*

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Workshop: Develop Your People and Learn to Create Your Own Finance Training Program

Abstract:

One of today's top challenges for every organization is attracting, developing, and retaining top financial talent. Many finance managers and executives want to provide training opportunities for their staff, but find that third party courses and programs do not necessarily directly benefit the circumstances of their workplace. The solution – develop your own training!

In recent years, developing customized training programs has become accessible to the masses with easy to use tools and software. In this workshop, you will learn how to develop an in-house training programs using leading learning principles and technologies. Isn't it time you deliver training and development to your own staff and reap the long-term benefits?

Who Should Attend:

Financial executives and managers who have an interest and passion for developing their people.

Presenter(s):

Blair has two decades of experience in developing training and development programs for the Big 4 firms and various post-secondary and professional institutes across the country. It was his greatest honor to be appointed the lead author and architect for the development of new and merged CPA Canada professional certification program. Blair is also a leading on-line instructor at the Proformative Academy (Proformative.com).

Jen too has two decades of experience in higher education. Jen was an award-winning professor at St. Mary's University and has developed learning for both the classroom and on-line. Jen too is a certified Proformative Academy instructor.

Topics Outline:

- Designing a training program
- Evaluating the choices between live training, blended training, and on-line learning
- Adult learning principles
- Rapid E-learning tools: screencasting, PowerPoint, Learning Management Systems
- How to convey content without making it boring
- Making your content visual for the learning
- Delivering content that gets remembered and acted upon

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Webinar, concurrent session and keynote presentations:

Both Blair and Jen are asked to speak regularly on various thought leadership topics of relevance to financial professional and all members of the Office of the CFO. Recent presentations have included:

- The CFO's Guide to Successfully Scaling a Growth Company
- Best Practices for a Quicker Financial Close
- Driving Growth and Delivering Earnings Predictability as the CFO
- On Becoming CFO: It's About the People
- Modern Competency Assessment in the Office of the CFO
- Becoming the Credible CFO
- Advanced Capital Budgeting: Analysis that Improves Long-term ROI
- The Role of Finance in the Boardroom
- CFO to Chief Trusted Advisor: Earning that Role with Your CEO
- Talking Strategy with Your Clients
- Your First 100 Days as CFO
- Financing Strategies for Your Clients
- Fraud Awareness and Prevention
- 10 Skills that Differentiate Financial Executives
- Reducing the Time to Revenue: How Finance Can Lead the Way

Many of these session have been developed in conjunction with our clients who have ideas about topics they would like included in their calendars or conferences. From there, we will research the topics and develop presentations to meet those learning objectives. So, if you've got a hole, we are happy to roll up our sleeves and do the research to aggregate the latest and greatest thinking on any topic you have in mind.

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