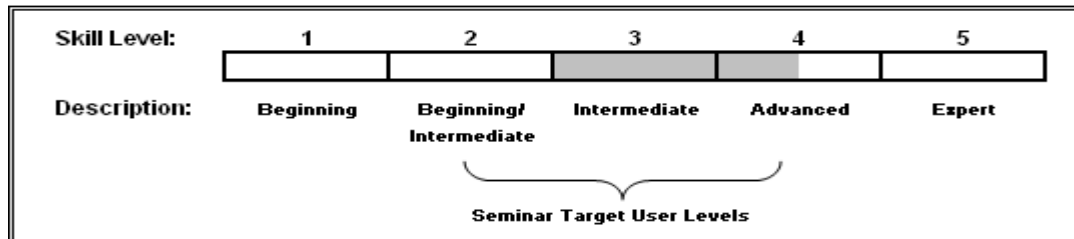


Excel Tips and Techniques for Increased Productivity and Improved Financial Modeling - *ADVANCED*

COURSE DESCRIPTION:

This 1-day ON-SITE SEMINAR features **Advanced** selected coverage of Microsoft® Excel. The course is primarily designed to introduce finance and accounting team members to some of the more powerful Excel features and functionality that are very useful in building more complex models. Includes an introduction to Excel VBA (Visual Basic for Applications). A CD with demo files is provided along with a binder of presentation slides and a copy of my Excel book “Navigating the Road to EXCEL-lence”.

6.0 Hours CPE



Major topics:

- **Key Advanced FUNCTIONS**
 - ✓ OFFSET
 - ✓ 3D-SUMMATION
 - ✓ INDIRECT
 - ✓ SUMPRODUCT
 - ✓ LOOKUP TIPS / INDEX and MATCH
- **Financial Modeling Concepts And Proven Architectural Approaches**
 - ✓ “Vertical” vs. “Horizontal” financial modeling
 - ✓ Structured approaches to building Excel models
 - ✓ User Interface techniques: – “On Sheet” vs. “Off Sheet” (UserForms)
 - ✓ “Case Studies” of selected model architectures
- **Key Advanced FEATURES**
 - ✓ ADVANCED FILTERING
 - ✓ PIVOT TABLES, data extraction techniques and performance implications
 - ✓ DATA TABLES (1-WAY, 2-WAY, and DYNAMIC)
 - ✓ PROTECTION TECHNIQUES / PROTECTION “Antidotes”
 - ✓ NAMED RANGES / NAMED FORMULAS / NAME MANAGER
- **Introduction to VBA**
 - ✓ Objects, properties, and methods ,Variables: types , uses, declarations
 - ✓ Coding techniques: using Offset, Error trapping, IF and Select Case constructs
 - ✓ LOOPING (Do-Loops, Do-While, Do-Until, For-Each-Next)
 - ✓ Avoiding the 3 most common ERRORS (Design, Run-Time, Logic)
- **Introduction to USER FORMS**
 - ✓ Creating a simple navigation menu

About the instructor:

Eric Augusta has over 25 years of business finance experience, having held positions as CFO, VP Financial Planning, VP Strategic Planning, Controller, Accounting Manager, and Financial Analyst, at both large companies (Xerox, Ford) and smaller, entrepreneurial organizations (Century Computer Marketing, Cerplex, Aurora Electronics). He is a certified Microsoft Office Excel Expert, an instructor at UCLA Extension and CalCPA Education Foundation. His unique combination of technical Excel knowledge and business experience makes this seminar a must for any Excel user wanting to become more productive quickly and learn valuable new modeling and productivity techniques. Mr. Augusta holds an MBA in Finance (Wharton, University of Pennsylvania) and a BA in Economics (Cornell University).

Cost (at your company location in the greater Los Angeles area): \$250 per person (minimum 4). Attendees 5 and above are \$150 for each additional participant. **Pricing subject to change without notice.*

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