Using Excel for Financial Modeling

NEW Group Internet-based course

August 20, 2014
2:00 p.m. – 4:00 p.m. ET

Course Level: Intermediate (basic knowledge of Excel is required) • No Prerequisite

Who Will Benefit
New employees to budget and finance departments and government staff who are interested in learning more about spreadsheet capabilities for financial modeling.

Program Overview
Participants will learn various techniques for maximizing the features of Excel during budgeting and planning work. Techniques that will be covered include: creating a spreadsheet database, running statistical analyses, analyzing multi-dimensional data through pivot tables, and preparing executive dashboard reports. A class example based upon a budget preparation worksheet or executive financial report will be used.

Seminar Objectives
• Understand financial and other external data sources and how to import the data into Excel
• Understand the most commonly used features of Excel for a budget or finance department and their benefits and limitations
• Understand advanced features of Excel for financial modeling, budgeting, and planning
• Understand various methods of presenting Excel data in executive reports, budget documents, and financial reports

Faculty
Please check www.gfoa.org for the faculty listing of GFOA staff and/or practitioners as it becomes available.

It’s Easy to Participate
• The GFOA’s Internet training is delivered to attendees via a secure website and audio conferencing service.

Equipment Needed
• A computer with a Web browser to view the presentation. If you have speakers for your computer, you will be able to listen to the training using them.
• If you do not have speakers for your computer, you will need a phone to listen to the presentation. (Speaker phone recommended, but not required.)

How It Works
• Participants will receive an e-mail invitation containing a link with instructions at the beginning of the week the course will be taking place from the e-mail address messenger@webex.com. (Please add this e-mail address to your “allowed senders list.”)
• View materials on secure Internet site.
• Ask questions at any time during the course and test your mastery of the material with interactive exercises.
• To join the event more quickly, you can set up Event Manager before the event starts. Go to: https://gfoa.webex.com/gfoa/ecsetup.php?frommail=1.

Learn more and register for this event at www.gfoa.org
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Please print or type. Register online at www.gfoa.org.

- Indicate if you are faxing this form. Fax accepted only with credit card payment or purchase orders. Do Not Mail the Original.

Name: ____________________________________________________

Title: _____________________________________________________

Employer: _________________________________________________

Address: __________________________________________________

City: _____________________________________________________

State/Province: ______________ Zip/Postal Code: _________________

Telephone: ________________________________________________

Fax: ______________________________________________________

E-mail: ___________________________________________________

- Check box to indicate if you are substituting for an active member.

Active Member #: __________________________________________

Active Member Name: ________________________________________

Please photocopy this form for additional registrants.

A copy of the confirmation and invoice will be sent as a PDF attachment via e-mail from training@gfoa.org. Please add this address to your allowed senders list.

Registration fee is per person, not per group. Early and/or student registration discounts do not apply to Internet training.

Register and pay for 3-9 participants and receive 10 percent off the total cost of the registrations. Register and pay for 10 or more participants and receive 15 percent off the total cost of the registrations. To qualify for the group discount, registrations must be submitted together. Individual registrations submitted separately or after the original group is submitted will not qualify for the group discounts.

The GFOA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.

Cancellation requests must be made in writing to the GFOA. All cancellations received five business days before the event date will incur a $20 administrative fee. No refunds will be issued after that date.

Substitutions (government entities only): A one-for-one substitution of a nonmember for an active member is allowed. If your organization has a current GFOA member on staff who is not participating in these training seminars, a nonmember may attend in his/her place at the member rate. You must provide the member number and/or name of the GFOA member on the registration form.

Inquiries: For information regarding administrative policies such as complaints and refunds, please contact the GFOA at training@gfoa.org or at 312-977-9700.

Registration Fees (Please Check One)

- $85 Active/Associate Member

- $160 Nonmember

Registration Fee $_________

Group Discount $_________

New member fee: Visit www.gfoa.org $_________ or call GFOA at (312) 977-9700 for fee

Discount for Paid New Member ($-25.00)

REGISTRATION TOTAL $_________

Payment Information (Please Check One)

Fees must be paid in U.S. dollars by check, credit card, or purchase order.

- Payment by check:
  Payable to “Government Finance Officers Association”
  Send to: GFOA • 3076 Eagle Way • Chicago, IL 60678-1030

- Payment by credit card: scan and e-mail the form to training@gfoa.org; fax: 312-977-4806; or send to: GFOA • 203 N. LaSalle St. • Suite 2700 • Chicago, IL 60601-1210
  □ AMEX □ Discover □ MasterCard □ VISA

Name on Card: _____________________________________________

Account Number: __________________________________________

Exp. Date: ______ / ______ (Mandatory)

Signature: _________________________________________________

- Bill Me. (Scan and e-mail it to: training@gfoa.org or fax: (312) 977-4806.)

You must include a purchase order number. Payment must be received for all registrations prior to the event date.

P.O. No: __________________________________________________

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