FINANCIAL MODELLING IN EXCEL – MODULE 2

Advanced Financial Modelling and Risk Evaluation

ONLINE LIVE FACILITATOR-LED (TEAMS)

PROGRAMME OVERVIEW

This advanced module builds on Module 1 and focuses on financial risk evaluation and disciplined model construction. It emphasises reliable interpretation and structured thinking to ensure outputs can be used confidently in decision-making.
Assumes well developed Excel skills, including using names in formulas and advanced IF statements.
A basic understanding of financial statements is required.

WHO THIS PROGRAMME IS FOR

People who have completed the first module and want to go further
Professionals who want to extend their Excel and financial modelling skills
Users looking for data management and Scenario skills
Users who want to understand the structure of an integrated, self balancing model

PROGRAMME OUTCOME

Apply advanced modelling techniques
Construct a three statement model and interpret it
Evaluate scenarios and risk
Interpret model outputs for decisions

Course Presenter

John Mitchell is the Owner and Director of Johannesburg School of Finance, a past member of the Investment Analysts Society, and holds a Degree in Philosophy. He spent the early part of his career in the South African mining industry initially in human resources and later managing an in-house printing company where he gained practical experience in exercising financial control. He has been a professional designer and presenter of financial courses for the past twenty-six years. His empathic and interactive style makes his courses both practical and enjoyable. He is able to illustrate the course material with examples from his own extensive business experience.

PRESENTATION AND FEES

Duration: Four consecutive days (Mon–Thurs)
Time: 08h30 – 12h30
Delivery: Live, online facilitator-led sessions
Programme Fee: R18,400 per delegate (no VAT) USD 1,165 per delegate.
Skills Development Levy: Suitable for inclusion in employer-funded Skills Development and training budgets.

FINANCIAL MANAGEMENT PROGRAMME (FMP)

This module may be taken as part of the JSF Financial Management Programme, a structured series of applied finance modules designed to build practical financial capability in working professionals.

SKILLS DEVELOPMENT & BEE RECOGNITION

This programme is structured to support employer Skills Development initiatives and internal training plans.
For levy-paying organizations, qualifying training spend may contribute toward Skills Development targets and internal BEE scorecard reporting processes.
Full supporting documentation is provided, including attendance registers, demographic data, assessments, certificates, and audit-ready documentation aligned to Category F.
Johannesburg School of Finance (Pty) Ltd has a Level 4 (100%) B-BBEE rating.

PROGRAMME STRUCTURE AND CONTENT OVERVIEW

The programme is delivered as a structured, four-day intervention focused on practical application. Content is organised to progressively build the ability to interpret, analyse and apply financial information in real business contexts.

CONTACT DETAILS

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THE DETAILED MODULE STRUCTURE IS OUTLINED BELOW

Detailed Programme Structure

Day One – Scenario Evaluation Techniques

- What-if analysis: Goal Seek, Solver, Scenarios
- Revision of naming techniques
- Model discipline and shortcuts

Day Two – Data Organization and Analysis

- Grouping data
- Subtotals and nested subtotals
- Pivot tables

Day Three – Advanced Logical Structures

- Advanced IF functions
- IS functions
- Conditional formatting

Day Four – Building and Interpreting Full Models

- Manual allocations
- Structured model building
- Recording assumptions
- Testing and interpreting outputs