Finance Mastery: A 4-Month Industry-Ready Program

A comprehensive, practice-first finance course designed for early professionals, graduate students, and career switchers. From financial statements to valuation models — build the skills that employers actually hire for.

4 MONTHS · 16 WEEKS · CAPSTONE INCLUDED

WHY THIS COURSE MATTERS

Finance is the Language of Business

The Gap in the Market

Most finance graduates enter the workforce knowing theory but struggling with real-world execution. Employers consistently report that new hires lack practical modeling skills, business acumen, and the ability to translate numbers into decisions.

What This Course Changes

- Bridges the gap between academic finance and industry practice
- Builds job-ready skills using the tools professionals actually use
- Develops analytical thinking through real case studies and live mentoring
- Prepares learners for roles in investment banking, corporate finance, FP&A, and consulting

PROGRAM OVERVIEW

Course Structure at a Glance

The program is structured across four progressive phases, each building on the last — from financial fundamentals to a capstone project that mirrors real industry deliverables.

1

Phase 1

Foundation
Weeks 1–4

2

Phase 2

Intermediate
Weeks 5–8

3

Phase 3

Advanced & Applied
Weeks 9–12

4

Phase 4

Capstone Project
Weeks 13–16

Weekly Format

- **Weekend Recorded Session:** Concept-focused, self-paced video modules
- **Live Mentoring Session:** 1:1 or small-group doubt clearing, case discussions, and feedback
- **5–6 Topics Per Week** with exercises and mini-assignments

Content Mix

- **70–80%** Core finance concepts and fundamentals
- **10–15%** Industry use cases and real-world applications
- **10%** Tools, workflows, and capstone execution

PHASE 1 · WEEKS 1–4

Foundation Phase: Building Financial Literacy

The first four weeks establish the non-negotiable bedrock of finance knowledge. Learners who skip fundamentals always struggle later — this phase ensures no gaps remain.

1

Week 1: Financial Statements Deep Dive

- Income Statement structure and analysis
- Balance Sheet — assets, liabilities, equity
- Cash Flow Statement — operating, investing, financing
- Linkages between the three statements
- Common-size analysis and vertical/horizontal reading
- Red flags and quality of earnings

2

Week 2: Time Value of Money & Core Math

- Present value and future value concepts
- NPV, IRR, and payback period
- Annuities and perpetuities
- Discounting and compounding in Excel
- Capital budgeting decision rules
- Mini case: Evaluating a project investment

3

Week 3: Financial Ratio Analysis

- Liquidity ratios (Current, Quick, Cash)
- Profitability ratios (ROE, ROA, EBITDA margin)
- Leverage and solvency ratios
- Efficiency and activity ratios
- Industry benchmarking and peer comparison
- Assignment: Ratio analysis of a public company

4

Week 4: Introduction to Financial Modeling

- Excel fundamentals for finance professionals
- Best practices in model architecture
- Building a basic P&L model
- Assumptions, drivers, and scenario tabs
- Formatting and audit-ready structure
- Mini project: 3-statement model skeleton

PHASE 2 · WEEKS 5–8

Intermediate Phase: Core Analytical Skills

Weeks 5 through 8 shift from reading financials to using them for decision-making. This is where learners begin to think and communicate like finance professionals.

1

Week 5: Valuation — Comparable Company Analysis

- Enterprise Value vs. Equity Value
- Key trading multiples (EV/EBITDA, P/E, P/S)
- Building a comps table from scratch
- Selecting and screening peer companies
- Spread and benchmarking analysis
- Assignment: Comps table for a real sector

2

Week 6: Valuation — DCF Modeling

- Forecasting revenue and EBIT
- Free Cash Flow to the Firm (FCFF)
- WACC calculation — cost of debt and equity
- Terminal value: Gordon Growth vs. exit multiple
- Sensitivity and scenario analysis
- Mini project: Full DCF model for a listed company

3

Week 7: Corporate Finance & Capital Structure

- Debt vs. equity financing — trade-offs
- Optimal capital structure theory (MM theorem)
- Dividend policy and share buybacks
- Cost of capital and leverage effects
- Credit ratings and debt covenants
- Case study: Capital structure decisions at a mid-cap firm

4

Week 8: FP&A and Budgeting

- Annual budgeting process and cycles
- Rolling forecasts vs. static budgets
- Variance analysis — actual vs. plan
- KPI dashboards and management reporting
- Zero-based vs. incremental budgeting
- Assignment: Build a department budget model

PHASE 3 · WEEKS 9–12

Advanced & Application Phase: Industry-Grade Work

The final structured learning phase introduces complex, high-value topics used daily by professionals in banking, PE, and corporate finance roles.

1

Week 9: M&A — Accretion/Dilution Analysis

- Strategic rationale for mergers and acquisitions
- Deal structure: stock vs. cash vs. mix
- Pro forma EPS and accretion/dilution math
- Purchase price allocation and goodwill
- Synergy modeling — revenue and cost
- Mini project: M&A model for a simulated deal

2

Week 10: LBO Modeling & Private Equity

- Private equity deal mechanics
- Leveraged buyout structure and debt tranches
- Building a leveraged buyout model
- IRR and MOIC — return analysis
- Exit strategies: IPO, strategic sale, secondary
- Assignment: Entry/exit analysis on a fictional LBO

3

Week 11: Equity Research & Investment Thesis

- Equity research report structure
- Top-down and bottom-up analysis
- Writing a buy/hold/sell recommendation
- Risk factors and bull/bear/base scenarios
- Sector-specific modeling nuances
- Assignment: Draft a 3-page equity research note

4

Week 12: Risk Management & Derivatives

- Types of financial risk — market, credit, liquidity
- Hedging strategies using forwards and options
- Interest rate risk and duration
- FX risk management for corporates
- VaR and stress testing basics
- Case study: Hedging an FX exposure for a multinational

PHASE 4 · WEEKS 13–16

Capstone Project: Real-World Simulation

The capstone is the culminating deliverable — a full-scale financial analysis of a real public company, structured exactly like a professional analyst's work product. It integrates every skill built across the program.

What You'll Deliver

- Complete 3-statement financial model
- DCF valuation with sensitivity tables
- Comparable company analysis (comps)
- Investment thesis with buy/hold/sell recommendation
- Risk section with scenario analysis
- 10–15 slide presentation deck

Weekly Capstone Milestones

01

Week 13

Company selection, data collection, and model structure setup

02

Week 14

Financial modeling — 3-statement integration and DCF

03

Week 15

Valuation, comps, and investment thesis writing

04

Week 16

Final presentation, peer review, and mentor feedback session

INDUSTRY EXAMPLE 1

DCF Modeling at a Mid-Cap Technology Firm

The Business Problem

A $500M revenue SaaS company was preparing for a Series D fundraise. The CFO's team needed to present a credible, investor-ready valuation to prospective VCs and growth equity funds. The existing financial model was fragmented and lacked scenario analysis.

How the Course Applies

- Analysts built a fully integrated 3-statement model linked to a DCF
- WACC was calculated using CAPM and sector beta benchmarks
- Three scenarios (base, bull, bear) were modeled with sensitivity tables
- Terminal value was derived using both perpetuity growth and exit multiple methods

Tools Used

- Microsoft Excel (advanced formulas, named ranges)
- Bloomberg for beta, cost of debt, and comps data
- Pitchbook for comparable transaction multiples

Business Impact

The refined model helped the company raise $120M at a valuation 18% above management's initial estimate. Early professionals on the FP&A team owned the model build entirely.

Early analysts who built the model received direct recognition from the CFO and were promoted within 12 months.

INDUSTRY EXAMPLE 2

M&A Synergy Analysis at a Consumer Goods Company

The Business Problem

A Fortune 500 consumer goods company was evaluating the acquisition of a regional competitor with $200M in annual revenue. The Corporate Development team needed to model deal economics, quantify synergies, and present a board-ready recommendation within three weeks.

How the Course Applies

- Analysts ran accretion/dilution analysis across stock, cash, and mixed deal structures
- Cost synergies were modeled by function: procurement, logistics, and shared services
- Revenue synergies were estimated using cross-sell penetration rate assumptions
- Goodwill and purchase price allocation were computed per accounting standards

Tools & Platforms

- Excel-based M&A model with dynamic deal structure toggle
- Capital IQ for target company financials and precedent transactions
- PowerPoint for board presentation

Business Impact

The board approved the deal at a 2.1x revenue acquisition multiple. Post-merger, synergies of $35M were realized within 18 months — ahead of the modeled timeline.

Junior analysts contributed 60% of the data collection, model construction, and slide preparation for the board presentation.

INDUSTRY EXAMPLE 3

FP&A Transformation at a Healthcare Services Firm

The Business Problem

A $1.2B healthcare services company had an FP&A function relying on static annual budgets with no rolling forecast capability. Leadership was making resource allocation decisions based on data that was 6–9 months stale. The CFO mandated a complete upgrade of the planning process.

How the Course Applies

- The team rebuilt the budgeting model using driver-based logic (patient volume, cost per visit)
- Rolling 12-month forecasts replaced the static annual plan
- Variance analysis reports were automated using Excel linked to the ERP
- KPI dashboards were built in Power BI for real-time executive visibility

Tools Used

- Excel + SAP for data extraction and model feeds
- Power BI for dashboard and visualization
- Anaplan considered for future-state planning tool migration

Business Impact

Forecast accuracy improved from 72% to 91% within two quarters. The CFO credited the new FP&A capability with enabling a $40M cost reduction initiative that was previously invisible.

ⓘ New analysts owned the Excel model rebuild entirely — a high-visibility project that accelerated their internal credibility.

TOOLS & TECHNOLOGY

The Finance Professional's Tech Stack

Mastering the right tools separates entry-level analysts from high-impact contributors. This course covers the industry-standard toolkit used across banking, corporate finance, and investment management.

Microsoft Excel

The non-negotiable core tool. Advanced formulas, financial modeling architecture, scenario analysis, and audit-ready formatting. Used in every role, every day.

Bloomberg & Capital IQ

Industry-standard platforms for pulling company financials, screening peers, sourcing transaction data, and accessing real-time market data for valuation work.

Power BI / Tableau

Business intelligence tools used by FP&A teams to build executive dashboards, visualize KPIs, and automate management reporting from ERP data.

PowerPoint

Finance communication happens in slides. Structuring board presentations, investment memos, and pitch decks with clarity and visual hierarchy is a core professional skill.

Python (Intro)

Increasingly used in finance for data analysis, automating repetitive tasks, and pulling financial data via APIs. Foundational exposure is now expected at progressive firms.

CAREER ALIGNMENT

Job Roles This Course Prepares You For

Finance is one of the most versatile disciplines in business. This program directly maps to high-demand roles across multiple verticals — from Wall Street to Fortune 500 corporate finance teams.

💼 Investment Banking Analyst

Financial modeling, pitch books, M&A analysis, and deal execution support at bulge bracket or boutique banks.

📊 FP&A Analyst

Budgeting, forecasting, variance analysis, and executive reporting inside corporate finance departments across all industries.

🔍 Equity Research Analyst

Covering public companies, building sector models, writing investment notes, and supporting portfolio managers with buy/sell recommendations.

🏦 Corporate Development Analyst

Driving M&A strategy, synergy analysis, and strategic partnership evaluation within large corporations or PE-backed companies.

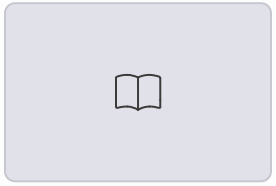
📈 Private Equity Analyst

LBO modeling, deal sourcing support, portfolio company monitoring, and return analysis for private equity or venture capital firms.

SKILLS PROGRESSION

From Beginner to Job-Ready: Your Skills Map

This course is deliberately sequenced to build skills in layers — each phase unlocking the next. Below is the progression map from Day 1 to job offer.

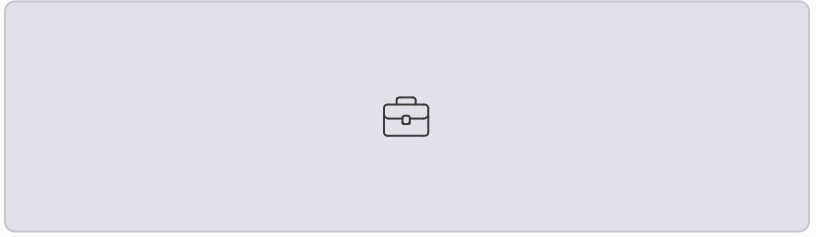


Beginner (Weeks 1–4)

Read and interpret financial statements · Perform ratio analysis · Basic Excel for finance · Time value of money

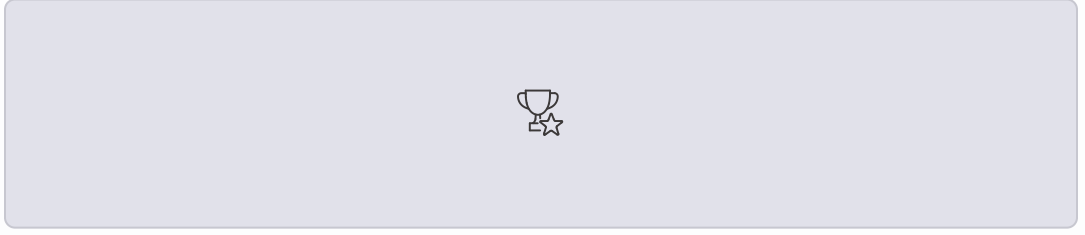
Developing (Weeks 5–8)

Build DCF and comps models · Understand capital structure · Perform variance analysis · FP&A fundamentals



Intermediate (Weeks 9–12)

M&A modeling · LBO fundamentals · Equity research reports · Risk management frameworks



Job-Ready (Weeks 13–16)

Full capstone deliverable · Board-ready presentation skills · Investment thesis writing · Interview-ready portfolio

KEY TAKEAWAYS

What You'll Walk Away With

A Professional Model Portfolio

A library of Excel models — DCF, LBO, M&A, 3-statement — that can be shown directly in interviews and on the job.

An Equity Research Report

A full investment note on a real public company with a documented buy/hold/sell recommendation and supporting model.

Capstone Presentation

A polished, board-ready financial analysis deck that demonstrates end-to-end analytical ability and communication skills.

Industry-Aligned Certification

A course completion certificate backed by a capstone project — validating both theoretical knowledge and practical execution.

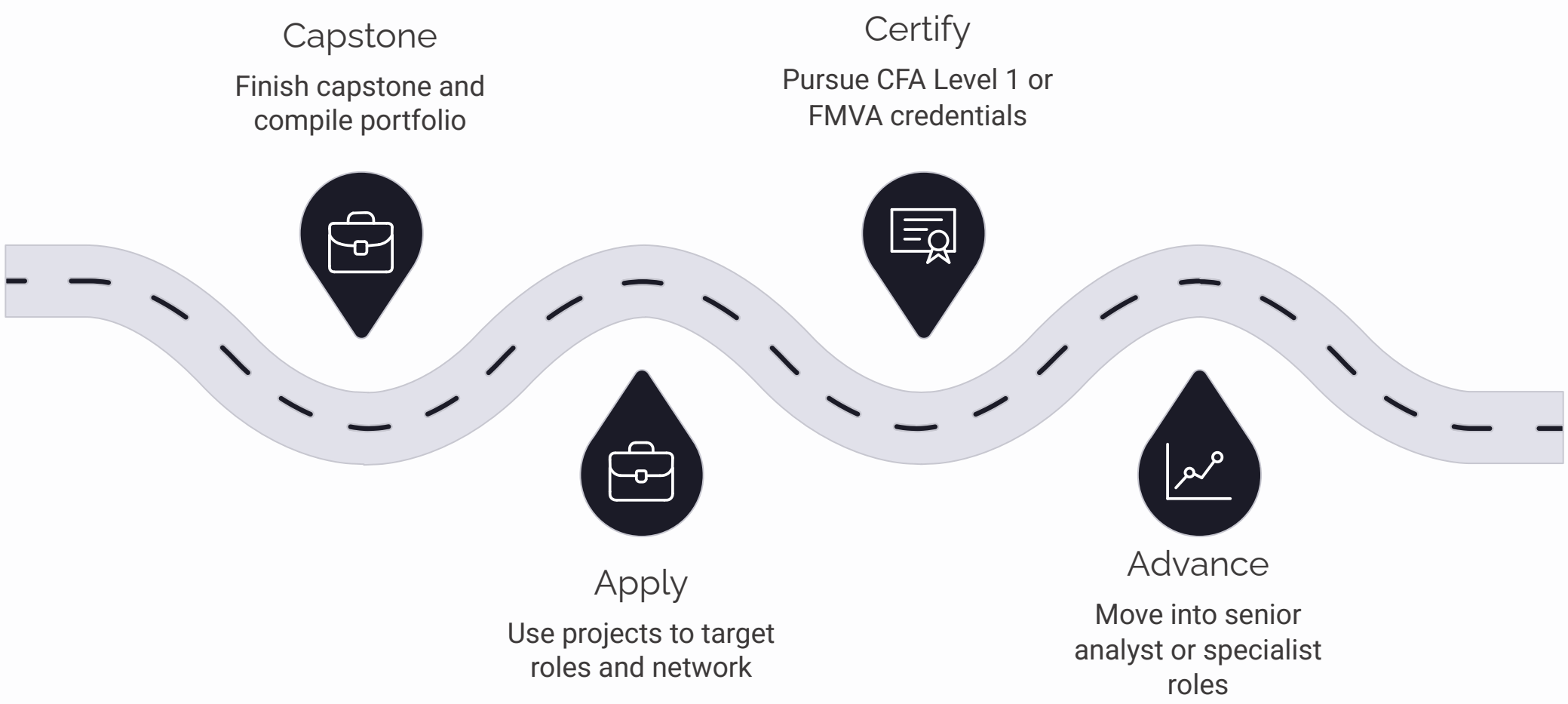
Mentor Network Access

Direct access to industry practitioners who provide ongoing feedback, career guidance, and professional networking opportunities.

YOUR NEXT STEP

Your Roadmap After Completing This Course

Completing this program is not the end — it's the launchpad. Here is the recommended progression for learners who want to continue building and accelerating their finance careers.



Certifications to Pursue

- **CFA Level 1:** Global gold standard for investment professionals
- **FMVA (CFI):** Practical financial modeling credential, employer-recognized
- **CPA or CMA:** Ideal for corporate finance and accounting-adjacent roles

Where to Apply First

- FP&A Analyst roles at mid-to-large corporates
- Investment Banking Analyst programs at boutique banks
- Equity Research rotational programs at asset managers
- Corporate Development at PE-backed or public companies

Learners who complete the capstone and apply within 60 days of graduation have a significantly higher interview conversion rate. Start your job search in Week 14 — don't wait for the certificate.