



FP&A[™]

Certified Corporate
**Financial Planning &
Analysis** Professional

Defining the Standard of Excellence in
Business Planning, Budgeting and Forecasting

AFP FP&A Certification and Training Program

- 1** Offers turn-key training; saving your organization time and money

- 2** Ensures your team is working with the same set of core competencies

- 3** Improves the efficiency of your team

- 4** Benchmarks employees and external candidates

- 5** Develops leaders internally, decreases departmental turnover and attracts top talent

- 6** Advances your FP&A team to become trusted internal strategic advisors

AFP has developed the **Certified Corporate FP&A Professional™** credential and the **AFP Financial Planning & Analysis Learning System™** to define the standards of the corporate FP&A profession.

Your team needs qualified individuals to analyze data, assess processes, provide insights and ultimately, guide the financial future of your organization. Well-trained and certified FP&A professionals are the leaders within the organization, having knowledge and awareness of leading practices to analyze and recommend actionable ideas, challenge the status quo, implement finance transformation and drive improved results.

How Does the AFP FP&A Certification and Training Program Help Employers?

Certified Corporate FP&A Professional Holders:

- › Gather qualitative and quantitative information on factors affecting the financial performance of an organization
- › Analyze data and relevant facts, consolidate and convey insight to support decision makers and other stakeholders
- › Assess and adapt processes to changes in the business environment throughout the entire decision support process
- › Effectively communicate with others from the CEO, board of directors to business unit leaders, internal and external to the organization

AFP Financial Planning & Analysis Learning System™

The first of its kind – **the only FP&A training program** that houses the wide breadth of knowledge that an FP&A professional is expected to know. The 15 chapters cover topics from business strategy and communication methods, to building scenarios and risk analysis, including:



- › Gathering, interpreting and understanding financial information
- › Building and interpreting financial projections, models, forecasts and budgets
- › Communicating business and financial information

Turn-Key Training

The AFP FP&A Learning System combines both reading materials and online learning tools.

Pre-Evaluation: Assess your team's current skill set.

SmartStudy Tools: Access a development plan customized for each team member.

Chapter quizzes: Test comprehension, retention and ability to apply concepts.

Case Studies: Apply concepts learned to real-world scenarios using Excel spreadsheets. Case study topics include:

- › FP&A strategy
 - › Managing FP&A projects
 - › Budget variance analysis
 - › Financial statement projections
 - › Financial model corrections
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Post-Evaluation and Practice Exams: Gauge the skills gained and identify further gaps that need development.

Progress Reports: Track your team's activities and scores.

Resource Center: Access Ask the Expert, test-taking tips and more.



Test your team's knowledge or demo the AFP FP&A Learning System at www.AFPLearningSystem.com/FPA.

“I do a lot of model development but I wasn’t aware of best practices such as the ‘plan-do-check-act’ cycle demonstrated in the FP&A Learning System. It’s a principle I’ll utilize going forward.”

— Travis Lockhart, FP&A
Manager of Financial Planning and Analysis
Information Management Consultants

Corporate/Group Learning

Multiple candidates within an organization can train at a discounted price with either a self-directed or instructor-led approach. Structured learning techniques and online reporting keep your group on track. **Train your entire staff** while eliminating costly travel expenses.

Instructor-led courses are available both in a classroom setting at your facility or online. It combines the AFP FP&A Learning System with the training of a qualified FP&A Certified instructor.

Self-study learning option provides a flexible approach and allows you the freedom to create your own study plan while devoting as much time as you like to any particular chapter or topic.

Contact Justin Barch at 301.961.8833 or jbarch@AFPonline.org for pricing and more information.

The AFP FP&A Learning System is Built on the Five Knowledge Domains of the Certified Corporate FP&A Professional Exam

1

FP&A Exam Part I

Financial Acumen:

Gathering, Interpreting, Understanding and Communicating Business and Financial Information

DOMAIN A

Concepts include: financial ratios, value-at-risk, growth share matrix, SWOT, hedging

Chapters:

1. Information and FP&A
2. Strategy
3. Organization
4. Industry
5. Macroenvironment

DOMAIN B

Concepts include: cost of capital, rolling forecasts, financial reporting, FP&A project management/communication, fixed & variable cost, zero based budgets, ratio analysis

Chapters:

6. Finance Principles and Processes
7. Financial Accounting and Reporting
8. Ratio Analysis
9. Managerial and Cost Accounting
10. Microeconomics
11. Managing FP&A Projects
12. Effective Communication

2

FP&A Exam Part II

Financial Analysis:

Building and Interpreting
Financial Projections

DOMAIN A

Concepts include: building & refining financial models, model consistency testing, variance/ratio/competitive analysis

Chapters:

1. Specifying Outputs and Getting Inputs
2. Improving the Quality of Information
3. Refining Data, Risks and Opportunities, and Plans
4. Building and Refining Models
5. Using Models and Sensitivities/Scenarios
6. Making Conclusions and Recommendations
7. Analyzing Information and Giving Feedback

DOMAIN B

Concepts include: cash flow, balance sheet, investment & sensitivity analysis, capital planning, revenue projections, ROI, NPV, “what if” scenarios

Chapters:

8. Looking Forward
9. Sales Volume and Revenue Projections
10. Financial Statement Projections
11. Valuing Projects, Customers, Deals and Products
12. Risk Analysis

DOMAIN C

Concepts include: financial functions, macros, pivot tables, v lookups, regression, expected value, standard deviation

Chapters:

13. Applying Best Practices to FP&A Technology/Software
14. Using Worksheets and Worksheet Functions
15. Working with Databases, ERP/GL and BI Systems

FP&A Exam

The Certified Corporate Financial Planning & Analysis Professional (FP&A) examination consists of two parts. The parts may be taken together or separately.

1

FP&A Exam Part I

Financial Acumen

2.5 Testing Hours (125 Exam Questions)

DOMAIN A

Gathering and Interpreting
Information

DOMAIN B

Communicating/Coordinating
Work with Other Professionals



Certified FP&A Professionals will be required to earn **45 continuing education credits** every three years.

2

FP&A Exam Part II Financial Analysis

4 Testing Hours (125 Exam Questions)

DOMAIN A

Analyzing Information

DOMAIN B

Building Financial Projections

DOMAIN C

Using Technology/Software

FP&A Examination Windows

Early Application Deadline

Final Application Deadline

August 1, 2015 – September 30, 2015 (2015B)

May 29, 2015

June 26, 2015

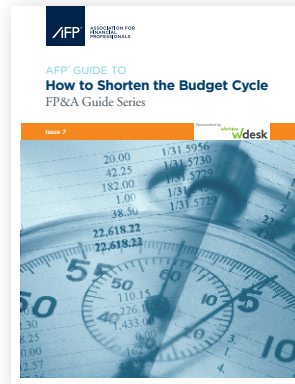
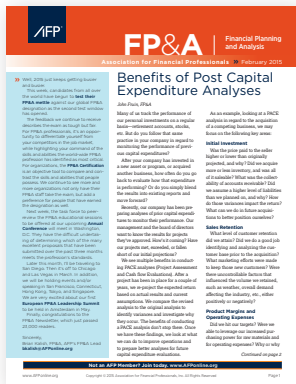
February 1, 2016 – March 31, 2016 (2016A)

November 20, 2015

December 18, 2015

FP&A Continued Development from AFP

Be part of the FP&A community – access unbiased news, research and networking events to keep your team up-to-date and relevant in the FP&A profession.



FP&A Newsletter

Subscribe to the FP&A Newsletter for best practices and unbiased news for FP&A professionals. Published monthly, the newsletter has more than 22,000 subscribers from over 110 countries.

FP&A Guides

AFP offers quarterly guides covering a range of topics related to FP&A. Each guide includes interviews with corporate practitioners and shares peer-tested ideas and leading edge thinking on critical topics. Past guides include Data Visualization and Making Capital Allocation Decisions and Shortening the Budget Cycle.



AFP Annual Conference

Meet with over 6,500 treasury and finance professionals on October 18-21, 2015. Find solutions for a more complex world with FP&A educational sessions, finance focused speakers, and an exclusive FP&A networking opportunities. Approved for FP&A continuing education credits.



FP&A LinkedIn Group

Join the FP&A LinkedIn Group, Certified Corporate FP&A Professionals, to stay up to date on FP&A topics. The LinkedIn Group features open discussions on challenges and solutions in a peer-to-peer environment of over 4,500 members.



Find out more at www.AFPonline.org/FParesources



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www.FPACert.org



ASSOCIATION FOR
FINANCIAL
PROFESSIONALS

About AFP[®]

Headquartered outside Washington, D.C., the Association for Financial Professionals (AFP) is the professional society that represents finance executives globally. AFP established and administers the Certified Treasury Professional and Certified Corporate FP&A Professional credentials, which set standards of excellence in finance. The quarterly AFP Corporate Cash Indicators serve as a bellwether of economic growth. The AFP Annual Conference is the largest networking event for corporate finance professionals in the world.

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