

# FINANCIAL ACUMEN TRAINING

**BUILDING SKILLS AND CONFIDENCE  
2- DAY ONLINE TRAINING - SPECIAL RATE FOR ADVISORS!**



## Advisors...are you confident in your financial literacy when speaking with business owners?

Based on our experience partnering with advisors over the years, your answer is likely "No."

**THERE IS NO SHAME IN THIS.** Just like the business owners who attend this course, you likely didn't become an advisor because of your financial acumen, but rather due to expertise in your field of choice.

The good news - financial literacy can be learned.

We invite you to join us for Financial Acumen Training, our 2-day educational series for advisors who want to equip themselves to have more insightful conversations with their clients!



### COURSE OVERVIEW

- Basic Accounting
- Types of financial statements: Balance Sheet, Income Statement, Cash Flow Statement
- Financial Performance: key metrics, Key performance indicators (KPIs), benchmarking
- Preparing Cash Flow projections
- Debt/financial and capital purchases
- Budgeting basics
- Applied learning exercises

### Does this sound familiar?

"I need to better understand company financials, in general. When I look at a budget, and all of the different line items, it is overwhelming to me."

"So much of my job is not talking about accounting so I'm excited to take this class and get a knowledge boost in this area."

## We Change Lives by Transforming Businesses

Journey Consulting uses a holistic approach that engages the business, financial and personal to achieve strategic outcomes for family owned and privately held businesses.

### OUR SERVICES:

- Exit & Transition Planning
- Business Valuations
- Part-time or Interim CFO
- Organizational Development
- Strategic Planning
- Mergers & Acquisitions

[journeyconsult.com](http://journeyconsult.com) | 920-770-4141 | [info@journeyconsult.com](mailto:info@journeyconsult.com)

### UPCOMING TRAINING SESSION:

**February 8 & 15, 2022  
10AM-12:00PM CST**

### Special rate for Advisors!

\$595 per advisor includes course materials and 2 half-days of training (\$400 discount)

**REGISTER TODAY:** [journeyconsult.com](http://journeyconsult.com)