

Build your finance dream team





The most *in-depth* online training platform for upskilling and developing finance teams.



Real-world learning
content curated by
industry experts



Mix-and-match courses
to create **custom
learning paths**



Allocate learning and
set deadlines with
admin tools



Track course progress
with easy-to-use student
reporting



Review learning
outcomes via formative
assessments



Reward your team with
**blockchain-verified
certificates**



100% online enables
around-the-clock access
to resources



On-demand platform
can quickly address need-
related knowledge gaps



**White-label your
training** with company
branding

Trusted by teams at:



Corporate training, designed by **you**

CFI has the deepest online learning library in finance with over 5,000 lessons, hundreds of hours of practical, hands-on video learning content; plus templates, tools and guided case studies for finance teams to hone their skills in. We make it easy for you to search, select and sort this learning content so you can create learning paths for your team that deliver you the best commercial outcomes.



Search

Easily navigate our learning content by topic, certification, specialization or difficulty level.



Select

Choose from one of our pre-designed curriculums, or mix-and-match courses to create a custom learning path.



Sort

Group and order your selected courses, then finalize your curriculum with the help of an online training expert.

Certifications and pre-designed curriculums

If you'd rather select a pre-designed curriculum, a CFI certification may be for you. Our prestigious certifications are globally-recognized and designed to provide students with practical skills that seamlessly transfer to real-world scenarios.

**Financial Modeling &
Valuation Analyst
(FMVA)®**



The prestigious **FMVA®** program covers all of the skills required to turn your team into world-class financial analysts and Excel power users. [Learn more.](#)

**Certified Banking &
Credit Analyst
(CBCA)™**



The **CBCA™** will enhance your team's knowledge across the entire lending process and ready them to excel as a credit analyst in banking. [Learn more.](#)

**Capital Markets &
Securities Analyst
(CMSA)™**



The **CMSA®** program will teach your team vital trading strategies, as well as market conventions and the tools used in capital markets. [Learn more.](#)

**Business Intelligence
& Data Analyst
(BIDA)™**



The **BIDA™** program will upskill your team across various programming and analytics tools, enabling them to analyze data like a pro. [Learn more.](#)

Financial Modeling & Valuation Analyst (FMVA)® Certification Program



CFI
For Teams

CFI's Financial Modeling & Valuation Analyst (FMVA)® Certification Program will teach your team the most important skills required to perform effective financial analysis. Whether it's mastering financial models; streamlining your budgeting and forecasting process; or simply improving competency levels across the entire accounting and finance spectrum, the FMVA can help build your finance dream team.

The program is packed full of downloadable templates, guided case studies and real-world video learning content to help your team upskill as quickly and efficiently as possible. Our courses cover fundamentals through to advanced concepts, enabling you to design learning paths for your team based on individual skill levels.



The FMVA® program
has upskilled teams at:



BOEING



verizon

Deloitte

EXXON

For Teams Focused On

- ✓ Financial Planning & Analysis
- ✓ Investment Banking
- ✓ Corporate Development
- ✓ Equity Research
- ✓ Private Equity & Venture Capital
- ✓ Corporate Valuation Services



29 total courses (14 required)



1841 total lessons



120+ downloadable templates, tools & guided case studies

Click to learn more at cfi.to/fmva

Financial Modeling & Valuation Analyst (FMVA)® Certification Program



CFI
For Teams

All Courses

Prep Courses (optional)

- Accounting Fundamentals
- Capital IQ Fundamentals
- Excel Fundamentals - Formulas for Finance
- Corporate Finance Fundamentals
- Macabacus Fundamentals
- Math for Corporate Finance
- Reading Financial Statements

Core Courses (required)

- Accounting Principles and Standards
- Budgeting and Forecasting
- Building a 3 Statement Financial Model
- Business Valuation Modeling Part I
- Business Valuation Modeling Part II
- Dashboards and Data Visualization
- Financial Analysis Fundamentals
- FP&A Monthly Cash Flow Forecasting
- PowerPoint and Pitchbooks
- Professional Ethics
- Scenario & Sensitivity Analysis

Elective Courses (choose 3)

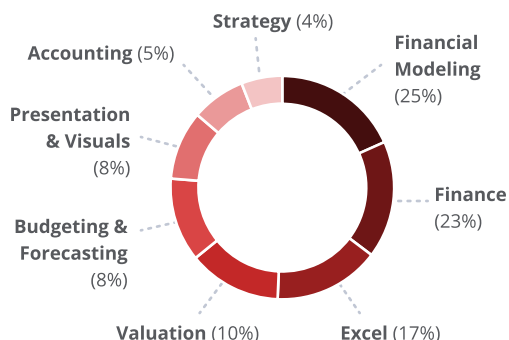
- Advanced Excel Formulas & Functions
- Corporate and Business Strategy
- Excel VBA for Finance
- Leveraged Buyout LBO Modeling
- Mergers and Acquisitions (M&A) Modeling
- Mining Financial Model and Valuation
- Presentation of Financial Information
- Real Estate Financial Modeling
- Renewable Energy - Solar Financial Modeling
- Startup / e-Commerce Financial Model & Valuation
- The Amazon Case Study

Template Library

- Financial Modeling Templates

Learn more at cfi.to/business

Curriculum Topics



Finance

- Present value, future value, net present value, terminal value
- Annuities and perpetuities
- Capital markets
- Capital raising process — Initial Public Offering (IPO)
- Capital structure — debt financing, equity financing
- Bond pricing, par value, coupon rate, yield to maturity

Valuation

- Comps analysis
- Precedents analysis
- Discounted cash flow (DCF) analysis
- Weighted Average Cost of Capital (WACC)
- Enterprise value, equity value multiples
- Free Cash Flow to the Firm (FCFF) and Free Cash Flow to Equity (FCFE)
- Net Present Value (NPV) and Internal Rate of Return (IRR)
- Sum-of-the-Parts (SOTP)

Accounting

- Balance sheet, income statement, cash flow statement
- Assets, liabilities, shareholders' equity
- Financial transactions
- Prepayments, accrued expenses, unearned revenue
- Operating cash flow, investing cash flow, financing cash flow
- Depreciation methods
- Working capital
- Property, Plant and Equipment (PP&E) and Capital Expenditures (CapEx)

Financial Modeling

- 3-statement financial modeling
- Discounted Cash Flow (DCF)
- Scenario and sensitivity analysis
- Monthly cash flow forecasting
- Accretion/dilution analysis
- Leveraged Buyout (LBO)
- Mergers & Acquisitions (M&A)
- Industry-specific financial modeling

Excel

- Functions and formulas (XNPV, XIRR, PMT, IPMT, VLOOKUP, CHOOSE, INDEX MATCH MATCH, OFFSET)
- Auditing tools (tracing precedents/dependents, go to special, conditional formatting)
- Data validation, data table, goal seek
- Solver and Macros

Budgeting & Forecasting

- Incremental, activity based, value proposition, zero based budgeting
- Break-even analysis, margin of safety
- Quantitative forecasting — moving average, simple and multiple linear regression
- Variance analysis
- Budgeting tools — goal seek, solver, consolidate, pivot tables

Presentations & Visuals

- Dynamic charts and graphs (football field chart, waterfall chart, tornado chart, gravity sort table, gauge chart, bullet charts, sparklines, combo chart)
- Professional pitch decks
- Financial dashboards

Strategy

- Strategic analysis process
- Corporate, business, functional-level strategy
- PEST and Porter's 5 forces
- Competitive advantage
- Key Performance Indicators (KPIs)
- SWOT analysis and lifecycle analysis
- Market segmentation and Porter's generic strategies
- Balanced scorecard

Commercial Banking & Credit Analyst (CBCA)™ Certification Program



CFI
For Teams

CFI's Commercial Banking & Credit Analyst (CBCA)™

certification program will teach your team the critical knowledge and skills required to underwrite better, more profitable deals. This includes a more robust understanding of financial analysis, credit structuring, and risk management.

The program is hands-on, designed to provide credit skills that seamlessly transfer into real-world scenarios, and to upskill teams across the entire analysis and underwriting process. Our courses cover credit fundamentals through to more advanced, specialized lending topics, allowing you to design learning paths for your team based on skill level or portfolio construction.



The CBCA™ program
has upskilled teams at:



For Teams Focused On

- ✓ Commercial Banking
- ✓ Business Banking
- ✓ Credit Analyst
- ✓ Risk Manager/Credit Adjudicator
- ✓ Rating Agencies
- ✓ Equipment Finance



35 total courses (19 required)



1487 total lessons



120+ downloadable templates, tools & guided case studies

Click to learn more at cfi.to/cbca

Commercial Banking & Credit Analyst (CBCA)™ Certification Program



CFI
For Teams

All Courses

Prep Courses (optional)

- Careers in Commercial Banking
- Accounting Fundamentals
- Introduction to Banking
- Banking Products and Services
- Forms of Business Structure
- Fundamentals of Credit

Core Courses (required)

- 5 C's of Credit
- Reading Business Financial Information
- Assessing Drivers of Business Growth
- Evaluating a Business Plan
- Assessing Management
- Cash Flow Cycles and Analysis
- Financial Analysis for Credit
- Building a 3 Statement Financial Model
- Loan Security
- Loan Covenants
- Credit Administration and Documentation
- Loan Pricing
- Account Monitoring and Warning Signs
- Business Writing Fundamentals
- Completing a Credit Application
- Professional Ethics

Elective Courses (minimum 3)

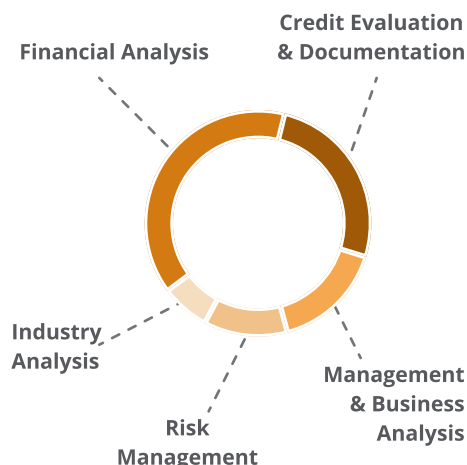
- Venture Debt
- Private Banking
- Commercial Banking – Debt Modeling
- Real Estate Fundamentals
- Commercial Mortgages
- Construction Finance Fundamentals
- Equipment Finance
- Lending to Complex Structures
- Syndicated Lending
- Retail, Restaurant, & Franchise Lending
- Lending to Medical Professionals
- Profitable Lead Generation
- Asset-Based Lending & Alternative Finance

Skill Practice

- Case Study - Woodchucks Ltd. Owner Occupied Commercial Real Estate
- Case Study - RockCrusher Rentals
- Case Study - Cool Tech Climate Solution
- Case Study - Bad Boys Brewing

Learn more at cfi.to/business

Curriculum Topics



Financial Analysis

- Margins, ratios, trends, profitability, cash flow, leverage
- Key lending ratios: working capital ratio, debt to equity ratio, debt service coverage ratio
- Income statement, balance sheet, cash flow statement
- Levels of financial reporting: audited, review engagement, notice to reader
- Business taxation

Credit Structure and Documentation

- Covenants: positive vs negative; financial vs. non-financial
- The stringency of financial statements: NTR vs. Reviewed vs. Audited
- Credit risk rating considerations
- Cash flow considerations: revenue, COGS, margins, A/R, Inventory, A/P, CapEx
- Credit considerations: debt level, interest rates, expansion plans
- Account review procedures

Risk Management

- Loan security
- Direct & indirect security
- GSA vs guarantee vs. collateral
- MAST
- Account monitoring

Management and Business Analysis

- Business structures: sole proprietorship, partnership, corporation, limited liability companies, franchises, joint venture
- Business lifecycle
- Competitive advantage
- Ansoff growth matrix
- SWOT analysis
- Management assessment framework
- PESTEL analysis
- Hax's delta model

Industry Analysis

- PESTEL analysis
- Porter's five forces
- Industry life cycle

Capital Markets & Securities Analyst (CMSA)® Certification Program



CFI
For Teams

CFI's Capital Markets & Securities Analyst (CMSA)®

certification program will provide your team with a deeper understanding of the various products and asset classes that make up the capital markets. Your team will gain a comprehensive overview of fixed income and equities securities including commodities, foreign exchange and derivatives.

The program provides experiential learning of not only the technical knowledge, but importantly for your business, its real-world application. This includes a focus on the tools used by professionals on Wall Street. Our courses cover fundamentals through to advanced concepts, enabling you to design learning paths for your team based on skill level.



The CMSA® program
has upskilled teams at:



Morgan Stanley

BLACKROCK



J.P.Morgan



For Teams Focused On

- ✓ Sales & Trading
- ✓ Asset & Portfolio Management
- ✓ Wealth Management
- ✓ Buy-side and Sell-side Analysts
- ✓ Treasury
- ✓ Risk Management



29 total courses (15 required)



1622 total lessons



120+ downloadable templates, tools & guided case studies

Click to learn more at cfi.to/cmsa

Capital Markets & Securities Analyst (CMSA)® Certification Program



CFI
For Teams

All Courses

Prep Courses (optional)

- Economics for Capital Markets
- Foreign Exchange Fundamentals
- Introduction to Capital Markets
- Math Fundamentals for Capital Markets
- Refinitiv Workspace Fundamentals

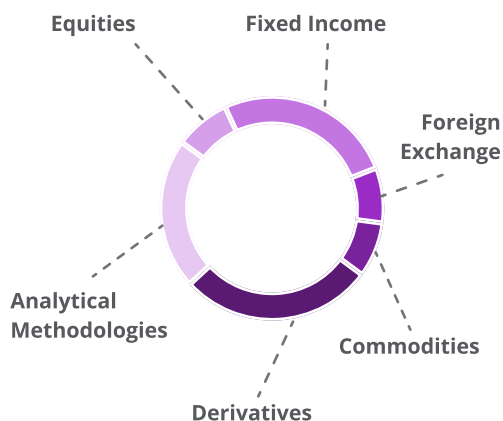
Core Courses (7 required)

- Fixed Income Fundamentals
- Commodities Fundamentals
- Derivatives Fundamentals
- Equity Markets Fundamentals
- Spot Foreign Exchange
- Portfolio Management Fundamentals
- Professional Ethics
- Hedge Fund Fundamentals

Elective Courses (minimum 7 required)

- Advanced Fixed Income
- Behavioral Finance
- Convertible Bonds
- Credit Fixed Income
- High-Yield Bonds, Subordinated Debt, and Loans
- Applied Fixed Income
- Futures Pricing and Commodity Futures
- Equity, FX, and Rate Futures
- Option Mechanics and Trading Strategies
- Swaps Fundamentals
- Prime Services and Securities Lending
- Repo (Repurchase Agreements)
- Securitized Products Part 1
- Short Duration Products
- Trading Using Technical Analysis
- Advanced Futures & Forwards

Curriculum Topics



Equities

- Equity Securities
- Sectors and Industries
- Markets, Exchanges and Indexes
- Volume and Liquidity
- Funds
- Order Mechanics
- Equities Fundamentals
- Fundamental and Relative Valuation
- Investment Styles and Strategies

Fixed Income

- Bond basics
- Risk Measures
- Credit Fixed Income
- High-Yield Bonds
- Zeroes, Floaters and Linkers
- Money markets and Repos
- Convertible Bonds
- Asset-backed securities

Foreign Exchange

- Foreign Exchange Fundamentals
- Executing FX transactions
- FX Forwards
- FX Swaps
- Cross-Currency Swaps and FX options
- Non-Deliverable Forwards
- FX Trading Strategies

Commodities

- Grains and oil seeds, soft commodities, livestock, energy and metals
- Commodity futures contract
- Commodity options contract
- Cash and carry arbitrage
- Intermarket spread, crush spread, crack spread, futures strip trade

Derivatives

- Vanilla derivatives
- Exotic derivatives
- Rates, FX and Credit swaps
- Equity derivatives
- Structured products
- Options Trading Strategies

Analytical Methodologies

- Technical Analysis
- Behaviour Finance
- Trading Strategies
- Economics for Capital Markets
- Research fundamentals

Learn more at cfi.to/business

Business Intelligence & Data Analyst (BIDA)™ Certification Program



CFI
For Teams

CFI's Business Intelligence & Data Analyst (BIDA)™

certification program will teach your team how to analyze data like a pro. Using case studies and interactive examples, it provides rapid upskilling across popular BI tools including SQL, Power BI, Tableau, Python, Power Query, Excel and Power Pivot.

The skills learnt in the BIDA program will help drive efficient decision making and save analysts hours of time. Participants will learn how to enhance error-prevention and problem-solving techniques; and ensure results are communicated powerfully through interactive dashboards. Our courses cover fundamentals through to advanced concepts, enabling you to design learning paths for your team based on skill level.



The BIDA™ program
has upskilled teams at:



Microsoft

amazon



Meta



Uber

For Teams Focused On

- ✓ Data Analyst
- ✓ BI Developer
- ✓ BI Partner
- ✓ Data Visualization Specialist
- ✓ Business Analyst
- ✓ Data Scientist



17 total courses (14 required)



1382 total lessons



Guided case studies covering **Power BI, Tableau and more**

Click to learn more at cfi.to/bida

Business Intelligence & Data Analyst (BIDA)™ Certification Program



CFI
For Teams

All Courses

Prep Courses (optional)

- Introduction to Business Intelligence
- Data Science Fundamentals
- Statistics Fundamentals

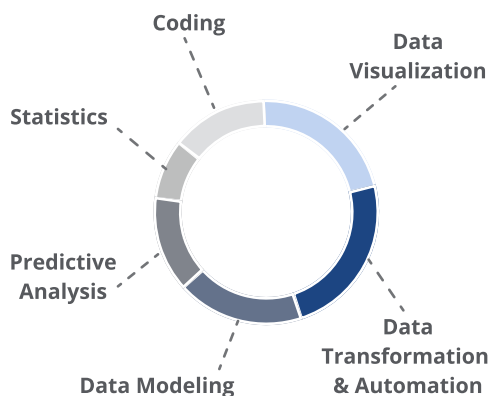
Core Courses (13 required)

- Power Query Fundamentals
- Power BI Fundamentals
- Power Pivot Fundamentals
- SQL Fundamentals
- Tableau Fundamentals
- Dashboards & Data Visualization
- Case Study - Financial Statements in Power BI
- Case Study - Trading Dashboard in Tableau
- Python Fundamentals
- Modeling Risk with Monte Carlo Simulation
- Loan Default Prediction with Machine Learning
- Professional Ethics

Elective (optional)

- Excel VBA for Finance
- Bayesian Statistics

Curriculum Topics



Data Visualization

- Building charts: Treemaps, Scatter, Candlestick, Correlation plots, bar, maps, line, area etc.
- Create & publish dashboards
- Highlight key messages
- Create interactive sections
- Advanced formatting in Tableau
- Tooltips and navigation
- How to tell stories with data

Data Modeling

- Types of relationships
- Fact and dimension tables
- Star and Snowflake schema
- Measures and DAX formulas
- Time-intelligence
- DAX formulas
- Slicers and filtering
- Table calcs in Tableau
- Level of Detail calcs in Tableau

Statistics

- Statistics 101
- Approaches to probability
- Descriptive statistics
- Bayesian stats
- Confidence intervals
- Conditional probability

Coding

- Use SQL to query a database
- Learn intermediate skills in Python
- Automate tasks with VBA
- Machine learning basics
- Risk modelling with Monte Carlo

Data Transformation & Automation

- Combining Multiple Files
- Cleaning data
- Connecting & querying databases, Excel & CSV files
- Filtering and JOINing data
- Dealing with missing data and errors
- Reading database documentation
- Automating transformations

Predictive Analysis

- Machine learning Inc. Linear regression and Decision Trees
- Exploratory data analysis & feature engineering
- Model evaluation
- Monte Carlo simulation
- Stock and Portfolio price simulation
- Value at Risk analysis
- Loan default prediction

[Request Demo](#)