Using Microsoft Excel for Financial Analysis

Course Description

This training course provide an introduction to using Excel for financial analysis. The student will be introduced to data manipulation in Excel, financial functions available, and other aspects of the program.

Completion Deadline & Exam: This course, including the examination, must be completed within one year of the date of purchase. In addition, unless otherwise indicated, no correct or incorrect feedback for any exam question will be provided.

Course Level: Overview. This program is appropriate for professionals at all organizational levels.
CPE Credits: 3 (CPA)
Category: Specialized Knowledge and Applications
Prerequisite: None.
Advanced Preparation: None

Course Learning Objectives

Module 1:   Introduction to Formulas in Microsoft Excel

1. Learn what a formula is.

2. Learn how to use Relative References.

3. How and when to use Absolute References.

4. How Excel uses Operator Precedence when calculating formulas.

Module 2:   Using Excel Formulas in Financial Analysis

1. Learn what the PMT function is, and how it is used.

2. Learn what the CUMIPMT function is, and how it is used.

3. Learn what the FV function is, and how it is used.

4. Learn what the DB function is, and how it is used.

5. Learn what the NPER function is, and how it is used.

6. Learn what the RATE function is, and how it is used.