

Society of Business Practitioners



Course Outline & Booklist

Graduate Certificate in Financial Consulting

(G.C.F.C.)

Graduate Certificate in Financial Consulting

Course Overview

In today's volatile economy, the role of a financial consultant has never been more critical. Whether advising a multi-million dollar corporation or an individual planning for retirement, consultants provide the strategic roadmaps that turn financial data into actionable growth.

Financial consulting is a service provided by Certified Financial Consultants to large corporations, government agencies and individual clients. The role of a financial consultant is to provide an independent, expert opinion on a proposed business plan or decision. There are two main types of financial consulting: business and personal.

Companies who require expertise in accounting, finance, insurance and other aspects of finance hire a business financial consultant. Individual clients use the services of financial consultants to manage their investments, property holdings and long-term financial plans. The skills required for these two roles are slightly different, as are the client expectations.

This course is designed to bridge the gap between "knowing the numbers" and "managing the money." It offers a practical deep-dive into financial planning, risk assessment, and client-centric advisory strategies. By the end of this program, you will not only understand complex financial statements but also possess the empathy and communication skills required to build long-term, trust-based client relationships.

The Graduate Certificate in Financial Consulting (GCFC) program covers the full spectrum of financial consulting, from an overview on business ethics in finance to strategic client management.

Core Learning Modules:

- **Business Ethics in Finance:**
- **Financial Statements Interpretation & Analysis**
- **Practical Corporate Finance**
- **Personal Financial Planning & Consulting**
- **Investment & Risk Management**
- **Advanced Portfolio Management**
- **Financial Consultancy Project Report**

Graduate Certificate in Financial Consulting

CONTENT FOR GCFC PROGRAMME

GCFC I – Business Ethics in Finance

The syllabus comprises of

- An overview of Business ethics.
- Fundamentals and framework of finance ethics.
- Ethical decision making and prioritising stakeholders
- Ethics, Arbitration and the retail customer.
- Microfinance and ethics in investment.
- Financial engineering and ethics in financial markets.
- Corporate objectives and corporate governance.
- Ethics in financial management and risk management.

GCFC II – Financial Statements Interpretation & Analysis

The syllabus comprises of:

- Group Financial Statements
- Evaluating Quality of Financial Reports
- The measurement of Income and Capital
- Intercorporate Investments
- Analysis and Interpretation of Financial Statements
- Developments in Financial reporting

GCFC III – Practical Corporate Finance

The syllabus comprises of

- Introduction to corporate finance
- Key theories and applications
- Time value of Money
- Valuation techniques
- Money, Banking, and Monetary Policy
- International Economy

GCFC IV – Personal Financial Planning & Consulting

The syllabus comprises of:

- Principles of modern financial Planning
- Formulation of Financial Strategy
- Financial Management
- Performance Measurement and Monitoring
- Banking and Debt
- Business Valuations and Acquisitions
- Investment Decisions and Project Control

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GCFC V – Investment & Risk Management

The syllabus comprises of:

- Management Control systems ▪ -
- Risk and Internal Control ▪
- Management of Financial Risk ▪
- Risk and Control in Information Systems ▪
- Stock Market instruments and Investment Decisions
- Analysis and valuation of equity investments ▪
- Fundamentals of Investment ▪

GCFC VI – Advanced Portfolio Management

The syllabus comprises of

- Introduction to Portfolio Management
- Introduction to Asset Pricing Model
- Analysis and Management of common stocks
- Equity Portfolio Management Strategies
- Bond Portfolio Management Strategies
- Evaluation of Portfolio Performance
- Professional Asset Management

GCFC VII – Financial Consultancy Project Report

- A consulting project report is a document that provides recommendations and insights to an individual, business or organization based on research and analysis conducted by a consultant. The consulting project/report format is highly dependent on the knowledge and business expertise or the type of problem a client is dealing with.

- Financial consulting projects/reports may cover a wide range of topics, such as financial market trends, competitive landscape, organizational structure and operational efficiencies.

- The consultant may use various methods to gather information, such as surveys, interviews and case studies and then use that data to identify problems and opportunities and offer solutions and recommendations for improvement.

- These recommendations are captured in the project/report, which is to be presented in a clear and concise manner with key elements.

Financial Consultancy Project Report Overview

Consultancy Report

A consultancy report is a high-level summary of the findings and recommendations a consultant provides for the client. In essence, it's a long-form document, detailing the background of the research, methodology, and key findings, along with the recommended course of action.

The background section of a consultant report has to cover the following questions:

- What is the project scope?
- Who and why commissioned the project?
- What were the initial assumptions?
- What type of data/assumptions were excluded?
- Who was involved in the project (from both sides)?
- Who is the author of the report?
- What research methods were used?

Format of a Consultancy Report

A consultancy report should provide a logical flow of information and give clear, coherent answers to the client's questions. The Financial Consultancy Project Report should be between 12,000 – 15,000 words.

The following is one of the most optimal consultancy report formats:

- Report cover
- Executive summary
- Background
- Key facts and business context
- Findings
- Recommendations
- Appendices (if any)

Consultancy reports are written by outside experts for groups or organizations that do not have the time or the expertise to treat the subject or problem. Hence, a consultancy report may present experimental work on a problem defined by a client.

A consultancy research shines extra light on specific problems your client is facing and suggests the expertise to solve them.

Graduate Certificate in Financial Consulting

RECOMMENDED BOOKLIST FOR GCFC PROGRAM

GCFC I – Business Ethics in Finance

Ethics in Finance, by John R Boatright, Wiley Blackwell; (2014)
ISBN: 978-1-118-61582-9

GCFC II – Financial Statements Interpretation & Analysis

Financial statement Analysis, A Global perspective by Thomas R. Robinson, Paul Munter, and Julia Grant from Pearson/ Prentice Hall ISBN 0-13—060121-7

GCFC III – Practical Corporate Finance

Corporate Finance The Core, Pearson; 3rd edition (2013), Jonathan Berk and Peter DeMarzo. ISBN-10: 0273792164

GCFC IV – Personal Financial Planning & Consulting

Personal Financial Planning: Theory and Practice by **Debbie Harrison** from Pearson Education. ISBN-13: 9780273681014

GCFC V – Investment & Risk Management

Investment Risk and Uncertainty: Advanced Risk Awareness Techniques for the Intelligent Investor, by Steven P. Greiner, Wiley; 1 edition (March 25, 2013)
ISBN-10: 111830018

GCFC VI – Advanced Portfolio Management

Portfolio Construction, Management, and Protection (with Stock-Trak Coupon), by Robert A. Strong, Cengage Learning; 5 edition (October 10, 2008)
ISBN-10: 0324665105

GCFC VI – Financial Consultancy Project Report

The Consultant’s Handbook by Samir Parikh. Wiley 2015. ISBN: 978-1-119-10620-3

Lifetime Financial Advice by Thomas M Idzorek & Paul D Kaplan. CFA Institute Research Foundation. ISBN: 978-1-952927-37-9

Guide to the 7 Step Financial Planning Process. CFP Board 2021.