



# Training The Street Catalog

Corporate Learning  
Public Courses  
Online Self-Study  
Academic Training  
Modeling Solutions

[www.trainingthestreet.com](http://www.trainingthestreet.com)

***We Unlock Career Potential***



# About Training The Street

Our teaching methodology is the benchmark in professional financial training.

Since 1999, Training The Street (TTS) offers targeted training courses to academic, corporate, and public course clients. TTS provides unparalleled training and practical skills development in accounting, corporate finance, financial modeling, capital markets and valuation topics for finance professionals.

By incorporating a mix of hands-on instruction, computer-based exercises, mini-lectures, group projects, visual presentations, and practical illustrations, we teach you real-world applications of finance theory in a way that brings finance fundamentals to life.

Through our diverse global footprint, extensive professional experience, and intuitive learning methodologies, we bring the fundamentals of finance to your fingertips. TTS is the training standard for finance and professional services firms, business professionals, and undergraduate and graduate students seeking careers in finance.

The benefits to partnering with Training The Street...

Company	Learning and Development Managers	Students
<ul style="list-style-type: none"> <li>Employee Capability</li> <li>Efficiency improvements</li> <li>High-quality deliverables</li> <li>Talent to execute business strategy</li> <li>Safe &amp; secure technology</li> <li>Align with and reinforce culture and norms</li> <li>Acceptable ROI</li> </ul>	<ul style="list-style-type: none"> <li>Learner outcomes aligned to business needs</li> <li>Program development &amp; administration efficiencies</li> <li>KPI &amp; metrics collaboration to demonstrate impact &amp; return on performance</li> <li>Complement recruitment, development &amp; retainment initiatives</li> </ul>	<ul style="list-style-type: none"> <li>Capability to perform at a high level</li> <li>Relevance to their role</li> <li>Hands-on and confidence building</li> <li>Effective use of time</li> <li>JIT support and resources</li> <li>Desk ready</li> </ul>

Trusted by financial institutions, universities and students around the world



# Corporate Learning

ON-SITE TRAINING PROGRAMS | CONTINUING DEVELOPMENT | ADVANCED TECHNICAL SKILLS



We work closely with our corporate clients to define requirements of the training population and create a customized program that addresses stated goals. This approach results in a highly effective training experience that equips your team with practical, relevant skills that can be applied immediately.

### Topics include:

- Corporate Valuation
- Accounting
- Financial Modeling
- Global Markets
- Data Sciences
- Excel and more

### Flexible delivery options:

- Comprehensive multi-day programs
- Single-day seminars
- Program advisory
- Large group training
- Webinars and continuing education workshops
- Remote
- Modeling solutions
- Consultative support

### Who is Corporate Learning for?

- Companies needing to train 8 or more people. Corporate learning includes:
- Pre-intern and campus recruiting events
  - Intern Programs
  - FT Analyst & Associate Programs
  - Corporate-wide capability development
  - DE&I Initiatives
  - Continuing development programs for experienced finance professionals



LEARN MORE

The following list of topics are part of the turnkey TTS content library. Topics can be combined and tailored to your needs, ensuring all learning objectives are satisfied for each program. Don't see something you need? Contact us at [info@trainingthestreet.com](mailto:info@trainingthestreet.com)

Accounting

Integrated Courses:

- Understanding Financial Statements
- Accounting Bootcamp
- Financial Statement Analysis
- Financial Statement Analysis and Accounting Complexities
- Accounting Complexities
- Add-on Modules:
- Accounting Foundations
- Income Statement
- Balance Sheet
- Cash Flow Statement
- Ratio Analysis
- M&A Accounting
- Income Taxes
- Leases
- Share-Based Compensation
- IFRS vs. US GAAP
- Discontinued Operations and Restructurings
- Earnings Per Share
- Pensions
- Bond Accounting
- Time Value of Money
- Sources of Public Information
- Notes, MD&A, and Oversight
- Foreign Currency
- Derivatives and Hedge Accounting Overview

Financial Modeling

Integrated Courses:

- Financial Modeling: Bootcamp
- Financial Modeling: An Introduction to Modeling
- Financial Modeling: Core

Add-on modules:

- Financial Modeling: Cash Sweeps
- Financial Modeling: Troubleshooting
- Financial Modeling: Modeling from Scratch

Valuation

Integrated Courses:

- Valuation Overview
- Financial Analysis and Accounting for Valuation
- Trading Comparables Fundamentals
- Trading Comparables Analysis
- Acquisition Comparables Fundamentals
- Acquisition Comparables Analysis
- Discounted Cash Flow Fundamentals
- Discounted Cash Flow Analysis and Modeling

Add-on Modules:

- DCF with Synergies
- DCF Issues I, II & III
- Analyzing the Valuation Results: Valuation Summary
- World of Returns
- Valuation Issues:
  - Stock Based Compensation
  - Non-Controlling Interests & Equity Affiliates / Associates
  - Leases in Valuation
  - Pensions
  - Cash and Equivalents Issues
  - Debt Like Provisions & Contingent Liabilities
  - Other Items
- Sum of the Parts Valuation
- Valuation in Emerging markets
- Leases in Modeling and Valuation
- Valuation and Modeling Final Case Study

Merger Consequences Analysis and Modeling

Integrated Courses:

- Merger Consequences Fundamentals
- Merger Consequences Analysis and Modeling

Add-on Modules:

- M&A Modeling I & II
- Acquisition Finance Modeling
- M&A Modeling Issues

Private Equity and Private Company

Integrated Courses:

- Private Equity Transition Course
- Private Equity Masterclass
- Private Equity Analyst Course
- Private Equity Associate Course

Add-on Modules: LBO Core Series

- LBO Fundamentals and Valuation
- LBO Short Form Modeling
- Private Company Modeling: Case Study

Add-on Modules: LBO Expert Series

- LBO Long Form Modeling: Expert
- LBO: Tax Issues
- LBO: Financing Issues
- LBO: Buy and Build
- LBO Short Form Modeling with Enhanced Features
- LBO: Leveraged Recapitalization & Management Incentive Packages
- LBO: Restructuring – Debt to Equity Swaps
- LBO: Fund Structures
- Capitalization Tables and Equity Waterfall Modeling
- LBO Earnout Modeling

Excel

Integrated Courses:

- Excel Best Practices
- Applied Excel with Charting
- Applied Excel with VBA / Macros
- Applied Excel: 2-Day Course

Add-on Modules:

- Excel Best Practices
  - EBP1: Core Excel Functionality
  - EBP2: Excel Efficiencies
  - EBP3: Expert Excel Efficiencies
- Prepare Data for Analysis
  - Clean Data
  - Prepare Large Data Sets
- Analyze Data
  - Sort & Filter Data
  - Analytical Functions
  - Lookup and Reference Functions
  - Advanced Lookup and Reference Functions - 1 hour
- Database Functions
- Pivot Tables
- Data Visualization and Charts
  - Introduction to Data Visualization and Charts
  - Data Visualization and Charts
- Sensitivity Analysis
  - Introduction to Sensitivity Analysis Using Data Tables
  - Sensitivity Analysis Using Data Tables
- Scenarios Analysis
  - Scenarios Analysis
  - Expert Scenarios Analysis
- Array Functions
  - Array Functions I & II
  - Expert Array Functions
- Macros and Visual Basic for Applications (VBA)
  - Introduction to Macros: Print Macro
  - Introduction to Macros: Scenarios Macro



## Capital Markets

### Integrated Courses:

Capital Markets Bootcamp

### Add-on Modules:

Equity Capital Markets

Debt Capital Markets – Credit

Debt Capital Markets – Rates

Derivatives and Foreign Exchange

Restructuring and Chapter 11

## Global Markets

### Integrated Courses:

Economics / Capital Markets Fundamentals

Fixed Income Markets

Foreign Exchange Markets

Equity Markets

Derivatives

Credit Markets

Data Science for Global Markets

## Industry Courses

## Oil & Gas

### Integrated Courses:

Introduction to Upstream Oil & Gas Financial Modeling

Upstream Oil & Gas Financial Modeling

Upstream Oil & Gas Financial Modeling & Valuation

### Add-on Modules:

Introduction to Production & Reserves Forecasting

Drill-Out Production Forecasting

Oil & Gas Valuation Considerations

## Real Estate

### Integrated Courses:

Real Estate Financial Modeling and Valuation

### Add-on Modules:

Real Estate Fundamentals Using Applied Excel

Real Estate Acquisition Financial Modeling

Real Estate Debt Fundamentals

Real Estate Equity Valuation

Public Real Estate and REIT Fundamentals

## Software

### Integrated Courses:

Software Financial Modeling and Valuation

### Add-on Modules:

Software Fundamentals Using Applied Excel

Software Three Statement Financial Modeling

## Financial Institutions

### Add-on Modules: Banks

Introduction to Banks

Financial Statement Analysis for Banks

Fundamentals of Regulatory Capital

Regulatory Capital

Modeling Fundamentals for Banks

Bank Valuation

### Add-on Modules: Insurance

Non-Life Insurance Forecasting and Valuation

Life Insurance: Solvency and Valuation

## Sustainable Finance, ESG, and Project Finance Modeling

Sustainability and ESG Analysis

ESG in Portfolio Management

Project Finance Modeling Fundamentals

Project Finance Modeling

## Investment and Wealth Management

### Integrated Courses:

Investment Research Integrated Course

### Add-on Modules:

Investment Management Fundamentals

Portfolio Construction Theory

Complications with Company Analysis

Interim Period Modeling

Fundamentals

## Python

### Integrated Courses:

Python 1: Core Data Analysis

Python 2: Visualization and Analysis

Python 3: Web Scraping and Dashboarding

Python 4: Classification Machine Learning Models

Data Science Essentials with Python

### Add-on Modules:

Introduction to Python

Data Manipulation with Python

Data Visualization in Python

Data Analysis and Modeling with Python

Web Scraping with Python

Dashboarding with Python

Logistic Regressions with Python

Decision Trees with Python

Model Selection and Cross-Validation with Python

Python Simulation

Micro Sessions:

1: Introduction to Python and Python Objects

2: Python Data Structures and Control Flow

3: Python Functions and Introduction to NumPy

4: Data Manipulation with Python – Intro to Pandas

5: Data Manipulation with Python – Advanced Pandas

6: Visualization with Python

7: Linear Regression & Time Series Analysis with Python

8: Web Scraping with Python

9: Dashboarding with Python

## Data Science

### Integrated Courses: Power BI

Power BI Desktop

### Add-on Modules: Power BI

Power BI Data Foundations

Power BI: Power BI Dashboards

### Integrated Courses: SQL

SQL Data Queries & Analysis

### Integrated Courses: Tableau

Tableau Desktop

### Add-on Modules: Tableau

Tableau Data Foundations

Tableau Dashboards

### Integrated Courses: VBA

VBA 1: Introduction to VBA

VBA 2: Advanced Coding Techniques

VBA & Macros for Finance Professionals

### Add-on Modules: VBA

VBA Sessions:

1: Introduction to VBA and VBA Objects

2: VBA Objects, Control Flow and Basic Looping

3: Advanced Looping, Charting and Subroutines

4: Debugging, File Management, User Forms and Functions

## Data Communication

### Integrated Courses: Data Storytelling

Data Storytelling 1: Compelling Narratives

Data Storytelling 2: Data Visualization Essentials

Data Storytelling Essentials

### Integrated Courses: PowerPoint

The Power of PowerPoint

## Specialist Courses

### Financial Modeling Specialist Courses

### M&A Specialist Courses

### Restructuring Specialist Courses

### Corporate Finance Upskill Series

### Professional Skills

# Public Courses

OUR TEACHING METHODOLOGY IS THE BENCHMARK IN PROFESSIONAL FINANCIAL TRAINING



As a reflection of our philosophy and learning methodology, Training The Street's live instruction integrates mini-lectures, hands-on instruction, practical illustrations, group projects, and critical thinking exercises to optimize your learning experience and bring finance fundamentals to life.

## Public Courses Learning Methodology

Consistent with Training The Street's approach of "learning by doing", all of our courses focus on practical application with real-world examples. Each learning module explores finance theory and fundamentals with reinforcement through Excel modeling examples and exercises. Courses stress the consistency, clarity, and efficiency required when modeling complex situations and concepts. Our goal is to put the fundamentals of finance at your fingertips.

### Topics include:

- Accounting
- Corporate Valuation
- Capital Markets
- Excel
- Financial Modeling
- Private Equity
- Python
- Real Estate
- Software
- Sustainability and ESG

### Course delivery options:

- Comprehensive multi-day programs
- Single-day seminars
- Group training rates
- Live virtual / remote

### Our Public Courses are ideal for:

- Firms that need small groups or individuals up to speed quickly (new, lateral, or off-cycle hires)
- Financial services professionals (investment banking analysts or associates, consulting, research, asset management, private equity, brokerage, sales & trading, insurance, etc.)
- Corporate/strategic development or finance team members
- Individuals who are looking to enhance past learning and continue their education

## Public Courses

- 5-Day Core Comprehensive (Valuation & Modeling)
- 5-Day Enhanced Core (Valuation & Modeling)
- 3-Day Financial Statement Analysis (FSA) & Accounting
- 2-Day Fast Track Financial Modeling
- 1-Day Applied Excel
- 3-Day Undergraduate Bootcamp
- 2-Day Principles of Capital Markets
- Advanced LBO Topics – 2.5 hours
- Advanced M&A Topics – 2.5 hours
- Advanced Modeling topics – 2.5 hours
- Other Advanced Topics – 2.5 hours
- Evening Essentials – ½-day x 8 sessions (FSA, Valuation & Modeling)
- 4-Day Private Equity Transition **NEW**
- 1-Day Python Training - 3 Parts **NEW**
- 2-Day Software Industry Analysis & Financial Modeling **NEW**
- 2-Day Real Estate Fundamentals **NEW**
- 1-Day Sustainability and ESG Analysis **NEW**



[VIEW COURSE CALENDAR](#)

## Training The Street's Global Footprint:





# Self-Study Courses

WORLD CLASS FINANCE COURSES. ON YOUR SCHEDULE.

Training The Street's online self-study courses are perfect for busy professionals who want to sharpen their financial skills and advance their careers. Our self-study courses use the same content and the same instructors to put you in control so you can learn at your own pace.

## TTS Exclusive Build-a-Model Learning Tool

Many of our corporate finance topics benefit from learners building out comprehensive financial forecast models. TTS has revolutionized the way complex financial models can be self-studied, with our innovative 'Build-a-Model' solution.

These modules culminate with users downloading an Excel model template and building out a complete model alongside a series of step-by-step screen-capture videos with voiceover. Each short video contains easy to follow instructions that will gradually lead to creating a more complete file. Also available are the incrementally more complete Excel files that allow users to step into the modeling process at any stage to either allow for targeted learning or to simply continue where they left off.

The following eLearning courses are a part of the Build-a-Model series:

- Financial Modeling
  - Fundamentals
  - Cash Sweep
- Discounted Cash Flow Valuation
- LBO Analysis Fundamentals
- M&A Analysis Fundamentals
- LBO Modeling
- M&A Modeling

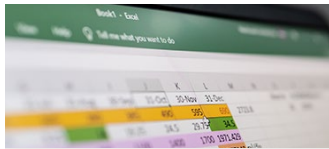


## Self-Study Courses

VIEW SELF-STUDY



Excel Best Practices



Applied Excel: Working with Data Sets and Scenario Analysis



Financial Statement Analysis & M&A Accounting



Corporate Valuation: How to Value Companies and Mergers



Introduction to Financial Modeling



Financial Modeling: Building a Complete Model in Excel



LBO Modeling: Building an LBO Model in Excel



Merger Modeling: How to Build an M&A Model in Excel



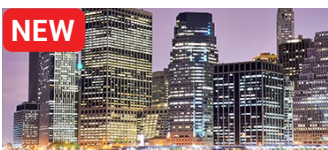
PowerPoint for PC



Introduction to Accounting: Financial Statement Basics



Software Industry: Analysis, Valuation and Modeling



Commercial Real Estate Fundamentals



Financial Math



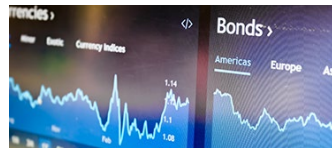
Capital Markets and Corporate Funding



Equity Capital Markets



Debt Capital Markets



Bond Markets



Equity Markets



Derivatives Fundamentals



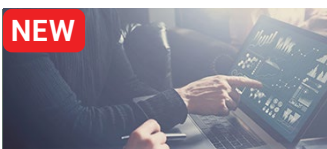
Portfolio Construction Theory



Foreign Exchange Markets



Python Fundamentals



Applied Machine Learning



Oil & Gas Industry: Valuation and Modeling



Banking and FIG Industry: Analysis, Valuation and Modeling



Excel Charting Techniques

COST EFFECTIVE | FLEXIBLE LEARNING | COMPREHENSIVE COURSEWORK | ANYTIME, ANYWHERE



# Academic Training

TARGETED CURRICULUM FOR UNDERGRADUATE AND GRADUATE STUDENTS



Training The Street has been offering workshops to college and graduate students since 1999. Organized through university career centers, faculty, or student clubs, Training The Street offers seminars for undergraduate students and MBA candidates at the top MBA programs globally.

LEARN MORE

**Academic Training Options**

- On-campus or off-campus financial training seminars
- Corporate recruiting events
- Introductory lectures on the industry
- Financial valuation and financial modeling boot camps
- Interview preparation

The following topics have been widely used at the most prestigious Universities and Business Schools world-wide. Programs are designed for this unique audience and intended to impart the knowledge, skills and confidence needed to succeed as they enter the workforce. Contact Us at [info@trainingthestreet.com](mailto:info@trainingthestreet.com) to learn more about how we can design the right program for your next academic event.

## Accounting

Financial Statement Analysis  
½-day  
1-day

## Applied Excel

Applied Excel  
½-day  
1-day  
2-day  
  
VBA / Macros – 2-4 hours  
Arrays – 2 hours  
Charting – 1-2 hours **NEW**

## Self-Study

Excel Best Practices  
Financial Modeling  
Corporate Valuation  
Financial Statement Analysis  
LBO Modeling  
Merger Modeling  
PowerPoint for PC  
Applied Excel

## Valuation & Modeling, Corporate

½-Day Undergrad Corporate Valuation  
MBA Corporate Valuation  
1-day  
2-day

MBA Corporate Valuation – Investment Management Focus  
1-day  
2-day

½-Day Undergrad Interview Prep  
1-Day MBA Interview Prep

Undergrad Finance Immersion  
1-day  
2-day

½-Day Undergrad Financial Modeling

MBA Financial Modeling  
1-day  
2-day

M&A Modeling  
½-day  
1-day

LBO Modeling  
½-day  
1-day

1-Day M&A & LBO Modeling

# Modeling Solutions

OUR FINANCIAL MODELING SOLUTIONS PRACTICE



We believe that financial models are the most important tools in modern finance.

Whether you are looking to improve an existing model or build a custom solution, we transform models into simplified, powerful communication and decision-making tools for managers and executives.

Consider the benefits that a good model delivers:

- Time Savings
- Model Flexibility
- Full Automation
- Powerful Summary
- Dashboards
- Improved Transparency
- Transferability

[LEARN MORE](#)

## Sample Modeling & Data Solutions

Training The Street can assist clients in designing, building, servicing, and reviewing various types of models, whether in Excel or other programs such as Python. Sample use cases include:

### FINANCIAL FORECAST MODELS

- Financial planning / budgeting and analysis (FP&A)
- Fundraising for prospective investors
- M&A impact analysis
- Debt financing options
- Project evaluation (real estate, mining, other)
- Internal investment decision-making
- Valuation (DCF, comparables, IRR, NPV, payback)
- Family office performance and planning
- 3-week cash flow
- Other cash flow stress-testing / scenarios

### OTHER REPRESENTATIVE SOLUTIONS

- Data collection / aggregation / standardization
- Workflow automation
- Data visualization
- Portfolio benchmarking and performance
- Client account tracking and performance
- Invoice verification
- Goodwill impairment testing
- Corporate financial consolidation
- Automated client proposals
- Real estate tenant recoveries template

## Sample Solution Mandates

	CLIENT	PROBLEM	SOLUTION
<b>FP&amp;A</b>	Portfolio company owned by prominent private equity firm	<ul style="list-style-type: none"><li>• Using legacy Excel model</li><li>• Difficult to update, unautomated, very slow</li><li>• Insufficient visibility and ability to run scenarios</li><li>• Private equity owner dissatisfied with timing and quality of periodic reports</li></ul>	Built a fully dynamic, integrated FP&A model Key functionalities included: <ol style="list-style-type: none"><li>1 Comprehensive assumptions module</li><li>2 Budget creation and live variance analysis</li><li>3 GL mapping and automated updating of actuals with accounting outputs</li><li>4 Reforecasting</li><li>5 Business line budgeting templates</li><li>6 Automated dashboards with embedded scenarios</li><li>7 Rolling valuation and returns analysis for equity owner</li></ol>
<b>Strategic Planning</b>	Large publicly-traded retailer	<ul style="list-style-type: none"><li>• Using a firm-wide software platform for budgeting and forecasting, but not suitable for CFO's office to use for strategic planning</li><li>• No ability to quickly explore operational and M&amp;A scenarios</li></ul>	Created a lean and powerful "executive suite" strategic forecasting model Features included: <ol style="list-style-type: none"><li>1 Segmented operating drivers at a higher level than budgeting tools to facilitate planning and board discussions</li><li>2 Financing and operating scenarios</li><li>3 M&amp;A integration</li><li>4 Dynamic dashboarding of base case forecast vs. scenarios</li><li>5 Built-in rolling valuation, credit and covenant analysis</li></ol>
<b>Lending Template</b>	Government-based lender/investor	<ul style="list-style-type: none"><li>• Using a wide array of personalized, errorprone Excel models across hundreds of loan approvals</li><li>• Financial analysis for loan approval process inconsistent and confusing</li></ul>	Worked with a deal team representing multiple regions and industry specialties to create a powerful, standardized template model Template featured: <ol style="list-style-type: none"><li>1 Full protection / security to avoid model changes and errors</li><li>2 Various options to drive forecast</li><li>3 Significant flexibility to choose capital structure</li><li>4 Multiple customized approval reports</li></ol>
<b>Data Solution</b>	Major publicly-traded bank	<ul style="list-style-type: none"><li>• Needed an automated solution to interface with employee web portal for mortgage commissions and deal database</li></ul>	Built a fully dynamic middleware solution Tool allowed the bank to seamlessly: <ol style="list-style-type: none"><li>1 Update mortgage commission rates</li><li>2 Pull transaction data from the employee web portal</li><li>3 Standardize and calculate commission data</li><li>4 Export records to deal database</li><li>5 Identify errors and inconsistencies</li></ol>





## CORPORATE OFFICES

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