

# **For the new managers:**

## **Introduction to Financial Statements**

It's important to provide your employees with the tools and resources they need to excel in their roles. One of the most valuable courses you can offer is an introduction to financial statements. Understanding financial statements is essential for making informed decisions and driving growth within your organization.

By providing your employees with this course, you can empower them with the knowledge they need to identify opportunities for growth, assess risk, and make informed decisions that drive success. Additionally, this knowledge will help your employees feel more confident in their day-to-day responsibilities, ultimately boosting their job satisfaction and engagement.

Investing in your employees' financial education is a smart move for any organization looking to thrive in today's competitive marketplace.

Unit 1 – The Profit & Loss Statement

Unit 2 – The Balance Sheet

## **Budgets & Forecasts for Managers**

As businesses continue to adapt to the ever-changing economic landscape, it's become increasingly important for new and experienced managers to have a solid understanding of corporate budgets and how to manage them effectively. Offering a training program or refresher course can provide valuable insights and practical skills that can help your team make better decisions, improve financial performance, and ultimately drive long-term growth.

By investing in the knowledge and skills of your managers, you'll be better equipped to operate efficiently, optimize resources, and achieve strategic objectives. Don't overlook the importance of budgeting and financial management training. Your bottom line will thank you.

Unit 1 – The Revenue Structure

Lesson 1 – Assessing Revenue

Lesson 2 – Scheduling and Forecasting Revenue

Unit 2 – The Expense Structure

Lesson 1 – Assessing and Predicting Expenses

Unit 3 – Understanding Net Profit Margins

Lesson 1 – Calculating Net Profit Margins

## **For employee wellness:**

### **Personal Finance Management**

Managing personal finances can feel overwhelming to many, especially when you have bills to pay, debts to clear and savings to build. Offering a personal finance management course to your employees is one of the best ways to help them develop financial literacy and make informed decisions.

Through this course, your employees can learn critical skills like budgeting, saving, investing, and managing credit and debt effectively. By taking the course, your employees will not only build their financial confidence but also improve their financial health, leading to less financial stress and increased productivity at work.

Take the first step towards a financially secure workforce by offering a personal finance management course to decrease the stress of your employees and increase productivity.

Unit 1 – Everyday Money Management

Unit 2 – Protecting Your Financial Assets

Unit 3 – Retirement Planning

Unit 4 – Your Personal Net Worth

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