



Advanced Corporate Finance for Family Businesses Training Course

21 – 25 June 2027
Montreux

Advanced Corporate Finance for Family Businesses Training Course

Ref: 1102_181376 **Date:** 21 – 25 June 2027 **Location:** Montreux **Fees:** 7500 Euro

Overview

Advanced Corporate Finance for Family Businesses Training Course is a one-week course for family business owners, private-company finance leaders, board members, next-generation executives and trusted advisers, who leave with a Family Business Finance and Capital Pack. Participants separate owner and company cash, normalize earnings, value a private firm, set financing and distribution policies, fund succession and govern related-party decisions. The course aligns ownership needs with company resilience. Agile Leaders Training Center develops family business corporate finance capability.

Who Should Attend

- Owners responsible for balancing family liquidity and business continuity
- Finance leaders responsible for funding, valuation and capital allocation
- Boards responsible for distributions, reinvestment and related-party oversight
- Next-generation executives preparing for ownership and financial decision rights
- Advisers responsible for translating financial evidence into governance choices

The course assumes participants can interpret company financial information, and it leaves out personal investment advice, tax structuring, legal drafting and family dispute mediation.

Departments and Industries

The course supports departments and industries where concentrated ownership shapes company finance decisions.



- Family offices, boards, ownership councils and corporate finance
- Treasury, accounting, strategy and private-company management
- Manufacturing, construction, energy and logistics
- Retail, hospitality, healthcare and professional services
- Technology, real estate and diversified family groups

Learning Objectives

By the end of this course, participants will be able to:

- Apply owner-company financial boundary controls
- Analyze normalized earnings and private-company value
- Evaluate debt, equity and retained-funding choices
- Build dividend and reinvestment decision rules
- Evaluate related-party and succession-funding decisions
- Build a board-level capital allocation recommendation



Course Agenda

Day 1: Ownership Boundaries and Financial Governance

- Family, Ownership and Company Role Map
- Owner-Company Cash Boundary Controls
- Financial Decision Rights Matrix
- Related-Party Transaction Review Protocol
- Board Finance Information Pack

Day 2: Private-Company Performance and Value

- Normalized Earnings Adjustment Bridge
- Owner Compensation and Nonoperating Item Review
- Private-Company Cash Flow Forecast
- Income, Market and Asset Valuation Comparison
- Control and Marketability Adjustment Assessment



Day 3: Capital Structure and Funding

- Debt Capacity and Coverage Model
- Retained Funding and External Capital Matrix
- Capital Cost and Risk Scenario Grid
- Lender Communication and Covenant Pack
- Funding Source Decision Scorecard

Day 4: Distributions, Liquidity and Succession

- Dividend and Reinvestment Policy
- Family Liquidity Needs Forecast
- Ownership Transfer Funding Scenarios
- Succession Finance and Redemption Model
- Capital Allocation and Approval Calendar

Day 5: Family Business Finance Practice

- Exercise: Separate Owner and Company Cash Decisions
- Exercise: Normalize and Value a Private Firm
- Exercise: Compare Capital and Funding Scenarios
- Exercise: Balance Dividends, Liquidity and Succession
- Capstone Exercise: Family Business Finance and Capital Pack



Practical Exercises

The course uses suggested activities to convert ownership priorities and financial evidence into governed company decisions.

- Suggested activity: classify family, ownership and company cash flows for a diversified group
- Suggested activity: normalize private-company earnings and compare valuation approaches
- Suggested activity: test debt, retained-funding and external-capital choices
- Suggested activity: present a distribution, liquidity and succession-funding recommendation

FAQs

Who suits corporate finance for family businesses training, and what does it assume?

Owners, finance leaders, board members, next-generation executives and trusted advisers suit the training. It assumes practical familiarity with company financial statements and ownership decisions.

How does family business corporate finance differ from general corporate finance?

Family business finance applies valuation, funding and capital allocation while accounting for concentrated ownership, owner liquidity, overlapping roles, related-party decisions, succession and continuity.

Why separate owner and company cash in a family business?

Separation makes company performance, funding needs, distributions and related-party transactions traceable, helping decision makers distinguish personal liquidity preferences from business requirements.

How is private-company valuation different?

Private-company valuation often requires normalized earnings, company-specific risk analysis, limited market evidence and careful consideration of control and marketability alongside income, market and asset approaches.

How should a family business set dividend policy?

A dividend policy should balance operating resilience, investment opportunities, debt commitments, ownership liquidity, fairness and succession needs through documented criteria and approval rights.



Conclusion

Participants take back a Family Business Finance and Capital Pack containing boundary controls, governance matrices, normalized earnings, valuation models, funding scorecards, distribution rules and succession scenarios. The pack makes ownership priorities and company economics comparable. It supports board decisions that balance resilience, growth, family liquidity and continuity.