Advanced Finance and Accounting Leadership Course

31 May – 11 June 2027
San Diego

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Training Center

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Advanced Finance and Accounting Leadership Course

Ref: 1187_187676 **Date:** 31 May – 11 June 2027 **Location:** San Diego **Fees:** 28000 Euro

Overview

Advanced Finance and Accounting Leadership Course is a two-week course for finance managers, senior accountants, controllers, FP&A professionals, budget owners, and business managers who leave with a Finance Leadership Operating Charter. Participants integrate reporting stewardship, management accounting, planning, performance, liquidity, investment governance, business partnering, and team leadership. The course addresses disconnected finance responsibilities through decision rights, review cadences, control gates, and evidence-based communication. It is non-degree professional training. Agile Leaders Training Center develops finance and accounting leadership practice.

Who Should Attend

- Teams responsible for finance governance, policy, and decision rights
- Teams responsible for accounting close, reporting quality, and internal control
- Teams responsible for planning, budgeting, forecasting, and performance dialogue
- Teams responsible for cost, margin, cash, and capital recommendations
- Teams responsible for finance business partnering and executive communication
- Teams responsible for finance capability, delegation, and team development

The course assumes participants already lead finance work or influence business decisions; it leaves out bookkeeping instruction, degree credit, software coding, tax advice, and exam preparation.

Departments and Industries

The course supports departments and industries that need accountable finance leadership across reporting, planning, and decisions.

- Finance, accounting, controlling, treasury, and FP&A departments
- Strategy, commercial finance, investment, and transformation departments
- Manufacturing, energy, logistics, and infrastructure organizations
- Banking, insurance, and professional-service organizations
- Healthcare, retail, telecommunications, and technology organizations

Learning Objectives

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

- Diagnose finance mandates, decision rights, controls, and reporting responsibilities
- Analyze financial statements, costs, margins, and operating performance
- Build governed budgets, forecasts, and performance-review routines
- Evaluate working capital, funding, and investment choices
- Apply business-partnering and executive communication methods
- Build a finance leadership charter and capability roadmap

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Course Agenda

Day 1: Finance Leadership Mandate

- Finance Purpose and Value Contribution Map
- Finance Accountability and Decision Rights Matrix
- Stakeholder Expectation Interview Guide
- Finance Service and Escalation Catalogue
- Leadership Risk and Priority Register

Day 2: Reporting Stewardship and Control

- Close-to-Report Process Ownership Map
- Financial Statement Relationship Review
- Accounting Judgment Documentation Template
- Reporting Quality and Disclosure Checklist
- Internal Control Exception Escalation Grid

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Day 3: Management Accounting Insight

- Cost Behavior and Contribution Decision Model
- Cost Driver and Activity Analysis Map
- Product, Customer, and Channel Margin Bridge
- Relevant Cost and Constraint Decision Sheet
- Management Insight Commentary Structure

Day 4: Planning and Budget Governance

- Strategy-to-Resource Alignment Canvas
- Budget Ownership and Challenge Protocol
- Driver Assumption Governance Register
- Integrated Financial Plan Architecture
- Resource Reallocation Decision Rules

Day 5: Forecast and Performance Leadership

- Rolling Forecast Review Calendar
- Scenario Trigger and Response Matrix
- Financial and Operational KPI Logic Tree
- Variance-to-Action Accountability Log
- Performance Dialogue Facilitation Guide

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Day 6: Liquidity and Working Capital Direction

- Cash Conversion Cycle Leadership Dashboard
- Receivables Risk and Collection Segmentation
- Inventory, Service, and Cash Tradeoff Model
- Supplier Terms and Resilience Assessment
- Short-Term Liquidity Decision Framework

Day 7: Investment and Funding Governance

- Incremental Cash Flow Review Checklist
- Investment Appraisal Assumption Challenge
- Risk, Sensitivity, and Scenario Profile
- Capital Portfolio Prioritization Matrix
- Benefits Ownership and Review Scorecard

Day 8: Business Partnering and Influence

- Business Model and Value Driver Map
- Partnering Conversation and Question Planner
- Decision Narrative Evidence Ladder
- Executive Recommendation Brief
- Constructive Challenge and Commitment Record

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Day 9: Finance Team and Digital Enablement

- Finance Capability and Role Heat Map
- Delegation and Review Control Matrix
- Data Ownership and Quality Responsibility Map
- Analytics Use-Case Prioritization Grid
- Finance Skills and Succession Roadmap

Day 10: Finance Leadership Integration Practice

- Exercise: Diagnose a Finance Mandate and Control Gap
- Exercise: Lead a Forecast and Performance Review
- Exercise: Challenge a Liquidity and Investment Recommendation
- Exercise: Present an Executive Finance Decision Brief
- Capstone Exercise: Finance Leadership Operating Charter

Practical Exercises

The course uses suggested activities that connect finance leadership choices with reporting, operational, and capital outcomes.

- Suggested activity: assign decision rights and reporting controls for a multi-unit manufacturing finance team
- Suggested activity: lead a forecast challenge using retail demand, margin, and cash evidence
- Suggested activity: balance liquidity, service, and supplier resilience in a healthcare case
- Suggested activity: defend a capital recommendation and leadership charter before an executive panel

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FAQs

Who suits advanced finance and accounting leadership training, and what does it assume?

Finance managers, controllers, senior accountants, FP&A professionals, budget owners, and business managers suit the training. It assumes responsibility for finance work, reviews, people, or business decisions.

How does finance and accounting leadership differ from a technical accounting course?

Finance and accounting leadership integrates reporting stewardship with planning, performance, liquidity, investment governance, business partnering, and team capability rather than concentrating on accounting rules or transaction processing.

How should finance leaders govern budgeting and forecasting?

Finance leaders should govern budgeting and forecasting through defined owners, explicit assumptions, operational drivers, challenge protocols, scenario triggers, review calendars, decision rights, and accountable follow-through.

What makes finance business partnering effective?

Finance business partnering is effective when financial evidence connects to business drivers, questions test assumptions, recommendations identify tradeoffs, decision owners commit to actions, and results return to a review cadence.

How should finance leaders prioritize team and digital capability?

Finance leaders should prioritize capability by mandate, process risk, decision value, data readiness, role gaps, adoption effort, control needs, and measurable operating outcomes.

Conclusion

Participants take back a Finance Leadership Operating Charter containing mandates, decision rights, controls, review cadences, analytical tools, partnering routines, and a capability roadmap. The charter turns scattered finance responsibilities into an accountable operating system. It helps finance teams lead reporting, planning, liquidity, investment, and business decisions with shared expectations.