How to Identify, Explain, and Present Pertinent Financial Information to Non-Accountants

- ***A Unique Simplified Method for Presenting the Three Principal Financial Statements***
- ***Identifying the Key Financial Metrics Non-Accountants Must Understand***
- ***Positioning the CPA as a Communicator of Solutions***

High-Impact interactive program, loaded with practical ideas and techniques to help non-accounting associates and clients understand the numbers.

Financial information is one of the most critical management tools to evaluate business success and profitability. Yet far too many non-accountants are unable to read financial statements and use this information to enhance profitability.

Most business decisions are intended to enhance performance and improve the "bottom line." An understanding of accounting and finance is essential for decision making and managing businesses more profitably.

This subject is especially beneficial with today's emphasis upon Teambuilding, and Employee Involvement, where responsibility, authority, and decision-making are shifting to lower organization levels.

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Seminar's Primary Focus:

- **Presenting the Three Principal Financial Statements** - a unique unorthodox graphic method that simplifies user understanding.
- **The Three-Step Process for Gaining Insight:**
    1. Identifying the key financial metrics - Key Results Indicators (KRIs)
    2. Determining the "drivers" that impact the metrics - Key Performance Indicators (KPIs)
    3. Presenting the metrics and drivers in understandable patterns
- **Developing Understandable Internal and External Financial Statements** — determining the purpose, selecting the proper metrics, simplifying the report format.
- **The Six-Step Process for High-Impact Presentations** — Knowing the audience, holding the listeners, feeling comfortable as a speaker, and adding visual impact.
- **Positioning the CPA as a Financial Leader and "superb communicator of solutions" within the organization and with your clients.**

What Will Be Learned:

- How to identify the numbers that determine an organization's level of success, not just measure it.
- How to help non-accountants understand and interpret financial statements and accounting reports.
- How to organize and present financial information to adult learners.
- How to make High-Impact Presentations.
- How to explain ten meaningful financial ratios to unlock the hidden meaning inside financial data.
- How to feel more confident and comfortable explaining financial information.

Who Should Attend:

CPAs who want to enhance their skills and abilities to explain financial information
to non-accountants, and feel more comfortable making presentations.

Seminar Materials:

Each participant will receive a large workbook, which will be used during the seminar and serve as a valuable take-home reference. The workbook includes many forms, schedules, and checklists (both financial and non-financial) that can be used immediately in business.

Seminar Length:

Half-day and Full-day - lecture, highly-interactive, small group discussions, exercises and case studies, opportunities for participants' questions.

CPE Credit: 4 hours and 8 hours.

Level of Knowledge: Basic.

Prerequisite: None.

Advance Preparation: None. Participants requested to bring a pocket calculator.

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About Your Seminar Developer / Presenter:

Jack Park is a highly effective developer and presenter of Financial and Leadership Development programs. He has developed several "Accounting and Finance for the Non-Accountant" seminars, that he presents each year to organizations and associations nationally. Park founded Financial Insights, a consulting and leadership development firm, after serving 22 years with four major corporations. He consults with organizations in the areas of Leadership Development, Business Planning, Profitability Analysis, and Cost Accounting.

Park has presented programs nationwide for 45 different State CPA Societies, Associations, Institutes and numerous Corporations. His corporate clients include Microsoft, BMW, Edward Jones, Home Depot, Nationwide Insurance, and Merrill Lynch. He serves as a Leader-In Residence instructor at the Franklin University Leadership Center. His knowledge and presentation skills ratings are consistently among the highest of all instructors

Park holds the National Speakers Association's Certified Speaking Professional (CSP) designation. The CSP, established in 1980, is the speaking industry's international measure of professional platform skill. Fewer than seven percent of NSA's 3,000 members hold this professional designation. He also received the Member of the Year Award from NSA's Ohio Chapter. Park earned his M.B.A. at The University of Pittsburgh and his B.S. from The Ohio State University.

Seminar Outline

Presenting the Three Principal Financial Statements - A Unique Unorthodox Approach

- Creating Financial Statement "Skeletons" for Understanding
- Income Statement (How We're Doing)
- Balance Sheet (Where We Are Now)
- Statement of Cash Flows (Where From, Where to)
- Performance Ratios
- Supplemental Accounting Reports

The Three-Step Process for Gaining Insight to Improve Profitability

- Identifying Key Financial Metrics - Key Results Indicators (KRIs)
- Determining the "Drivers" - Key Performance Indicators (KPIs)
- Presenting in Understandable Patterns
- The CPA as Trainer, Facilitator, Educator

Making High-Impact Presentations, a Six-Step Process

- Knowing the Audience
- Grabbing and Holding Listeners
- The Power of Body Language
- Adding Visual Impact

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