

CRF March Forum—Special Alternate Program

One-Day Training Session:

End-to-End Financial Statement Analysis

Tuesday, March 21, 2017—New Orleans, LA

Session Overview/Target Audience - *Designed for your team members/staff, this one-day training and professional development opportunity will provide participants with access to a model of how to conduct an end-to-end customer financial analysis in a short period of time. To enhance the experience, the model will be applied to live business cases chosen from the distribution, retail and technological service industries. The model draws on a variety of skills currently taught as part of CRF's online four course sequence in financial statement analysis. For those who have completed these courses, this one-day training represents an opportunity to renew, update and consolidate your skills in the context of comprehensive case analyses.*

The Instructor - Your instructor will be Steven Isberg, Ph.D., Sr Research Fellow, Credit Research Foundation. In addition to his primary role as adjunct professor at the Merrick Business School at the University of Baltimore, Dr. Isberg has been involved with the Credit Research Foundation for over 20 years, designing and delivering customized training programs, a variety of research projects, directing and reviewing surveys, and writing and reviewing publications. He has designed, authored and delivered the suite of well-renowned financial analysis courses currently offered by the Foundation to the community.

Session Content - **This 6-hour interface** will include instruction and interactive dialogue on the following elements of the financial analysis model:

- The business model— understanding the context for your financial analysis
- Identification of key drivers of financial performance and standing
- Analysis of key financial statement and ratio information
- Reaching conclusions about the short- and long-term sustainability of business performance
- Creating a watch list for moving forward

What is the Cost and What is Included - The following is included with your training session registration fee:

- **Monday, March 20**—Evening networking event at 5:00pm provides participants an opportunity to meet and interface with the balance of forum attendees from the community
- **Tuesday, March 21**—Six hours of comprehensive training that includes breakfast and lunch buffets
- **Wednesday, March 22**—Open Forum from 9:00am to noon, a moderated real-time, peer-to-peer exchange of needs and experiences that includes a continental breakfast

Registration Cost:

CRF Members \$695

Non-Members \$995