



Financial Management Oversight

Better understand what financial management oversight involves and how to use it effectively

Core Details

12.00pm — 14.30pm
City of London



2.5 CPD Hours

To Book

Call
+44 (0)204 551 8568
(Please choose option 2)

Email
info@thezishi.com

Online
thezishi.com

Your Consultant

Phil Ingle

Phil is a specialist training consultant with a depth of business experience in financial services and combines his knowledge of the industry with creative and energetic training and coaching skills. He is fascinated with the power of good communication and works internationally to help groups and individuals improve their skills. Most often Phil is coaching people in all aspects of communication from sales to presentations and his approach is tailored to the challenges faced by the individual in the context of the goals to be achieved. He has a wealth of relevant qualifications including an MBA (Cranfield), Master Practitioner – Neuro Linguistic Programming, Certificate of Competence in Occupational Testing, Associate of the Chartered Institute of Bankers and the Financial Planning Certificate. He is also actively involved with the Professional Speaking Association.

Financial outcomes are often the subtext of any business conversation. Yet studies of management meetings have shown that up to 65% of those present do not understand the language used and what the CFO is talking about.

Ensuring the financial situation is controlled and understood is a key element of making sure the board is aware of risks to the firm, its customers and business partners. Carillion casts a long shadow.

This 2 and a half hour workshop will cut through the jargon and help you clearly understand your role in identifying, understanding and overseeing financial risk to your firm.

- Recognise what the FCA/PRA expect
- Explore how to define financial management
- Discover what information you need and how to use it
- Consider the most relevant KPIs for your firm and its business partners
- Learn what can be delegated and what must be checked.
- Recognise the risks your business has to manage in this area.

Better understanding helps make better decisions

Provide better oversight – Ensuring you have and are using the most relevant information, and are aware of the trends and developments which affect financial management.

From Compliance to performance – You'll take your firm beyond just keeping the regulator happy. Be prepared to challenge about changes and trends which will affect financial outcomes.

Better information – It's not what you have but what you look at, how you use it and how you engage others with it.

Focus on growing your firm – Avoiding the "banana skins" which may lie within financial reports can help you spend less time on the regulatory and compliance issues, so you can spend more time thinking about the steps you need to grow your business and secure its future.

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Agenda

Cost

£375 / person + VAT £450

A discount of 10% per person is available when booking for 2 or more delegates on the same course in a single booking.

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In-house Course?

This course works well as an in-house event, contact us to discuss your needs on 0204 551 8568 or email info@thezishi.com

Session	Details
Introduction	<ul style="list-style-type: none"> • What is “financial management oversight” for a financial services organisation? • Overview of the key elements • Regulatory expectations of directors
Essential financial controls	<ul style="list-style-type: none"> • How should the finance function work with the rest of the firm? • Cash and client money • Analysing performance • Forecasts and variances
Identifying potential problems	<ul style="list-style-type: none"> • Internal controls and checks • Will it keep you awake? • Systems and the human factor
Using relevant KPIs and tools	<ul style="list-style-type: none"> • Revenue, profit, cash • Liquidity options • “Stress test” you and/or your customers
Case study: what would we have done?	<ul style="list-style-type: none"> • How the figures paint a picture • Root cause analysis • What did the board meeting look like? • The role of Auditors



ZISHI Cornerstone



The CPD Standards Office
 CPD PROVIDER: 21020
 2016 - 2018
www.cpdstandards.com

