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CHARTERED FINANCIAL PLANNING AND ANALYSIS MANAGER™

CFPA™

Fully Accredited By:

Chartered Institute of Professional Certifications

CPD Certification Service

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CHARTERED FINANCIAL PLANNING AND ANALYSIS MANAGER™



PROGRAM OVERVIEW

The role of FP&A is shifting from explaining historical financial performance to shaping the decisions that determine future profitability, investment returns, and organizational resilience. Finance leaders are now expected to deliver forward-looking insight, challenge business strategy, and translate financial complexity into clear executive recommendations. Meeting this expectation demands more than technical forecasting skill; it requires an integrated command of business performance, capital allocation, and strategic financial leadership.

This certified program equips finance professionals with the strategic expertise, advanced analytical capabilities, and practical frameworks to transform financial planning into a powerful driver of enterprise performance. You will master **strategic budgeting, integrated three-statement financial modeling, rolling forecasts, and performance management** to align financial priorities with corporate strategy. Through practical applications, you will identify critical **business drivers, evaluate financial risks, and develop reliable projections** that support executive decision-making.

ACCREDITATIONS

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PROGRAM OVERVIEW

Beyond core FP&A disciplines, you will apply **scenario planning, variance analysis, profitability assessment, and cost optimization techniques** to uncover **performance gaps** and strengthen **financial resilience**. You will also develop strategies to optimize working capital, evaluate investment opportunities, and formulate capital allocation recommendations that maximize enterprise value.

Throughout the program, you will learn to develop **board-ready KPI dashboards, communicate compelling financial narratives, and translate complex financial information** into actionable strategic recommendations. You will also explore AI-enabled forecasting, business intelligence, and FP&A automation to enhance predictive accuracy and financial visibility. Ultimately, you will emerge equipped to lead FP&A transformation, influence executive decisions, and serve as a trusted strategic business partner.

Upon successfully completing the program and passing the Chartered examination, you will earn the **Chartered Financial Planning and Analysis Manager (CFPA™)** designation, a distinguished credential that demonstrates your command of strategic FP&A, performance management, and finance business partnering.

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KEY SKILLS YOU WILL GAIN

From This Program



STRATEGIC FINANCIAL PLANNING
FINANCIAL BUSINESS PARTNERING
FINANCIAL STATEMENT ANALYSIS
FINANCIAL PERFORMANCE ANALYSIS

FINANCIAL RATIO ANALYSIS
EARNINGS QUALITY ASSESSMENT
DRIVER-BASED BUDGETING
ROLLING FORECASTING

REVENUE & COST FORECASTING
INTEGRATED FINANCIAL MODELING
THREE-STATEMENT MODELING
SCENARIO PLANNING

SENSITIVITY ANALYSIS
MONTE CARLO SIMULATION
CORPORATE PERFORMANCE MANAGEMENT
KPI DEVELOPMENT & MONITORING
FINANCIAL VARIANCE ANALYSIS

FINANCIAL DASHBOARD DEVELOPMENT
STRATEGIC COST MANAGEMENT

YOUR FACULTY DIRECTOR



Pierre Faddoul

Chief Financial Officer | Strategic Finance, FP&A & Investment Management Expert

Pierre Faddoul is a distinguished finance executive, CFO, and investment professional with over 19 years of international experience spanning Asia, Europe, and the United States. Beginning his career at **PricewaterhouseCoopers (PwC)**, he built deep expertise in **financial reporting, performance analysis, risk assessment, and financial governance**. Throughout his career, Pierre has evaluated financial performance, investment opportunities, and strategic business decisions, overseeing and assessing more than **US$40 billion in investments and M&A transactions**.

Pierre has held senior roles at **Tokio Marine Asset Management, Deutsche Bank Asset & Wealth Management, Aberdeen Asset Management, and BNP Paribas Fortis**. Currently serving as **Chief Financial Officer at Austrianova** and Founder and Managing Director of Square Associates, he brings hands-on C-suite expertise in **financial strategy, performance management, capital allocation, and investment decision-making**. He also lectures on Firm Valuation and Mergers & Acquisitions at **ESSEC Business School** and holds an MBA from ESSEC and a Master's in Economics from Université Paris-II Assas.

OUR PARTICIPANTS

Over 70% of FORTUNE 500 Companies Have Attended Our Accredited Programs Before























PROGRAM AGENDA

MODULE 1 - FOUNDATIONS OF FINANCIAL PLANNING AND ANALYSIS (FP&A)

- The strategic role of FP&A in modern organizations
- The FP&A operating model
- Key FP&A tools and frameworks

MODULE 2 - FINANCIAL STATEMENT ANALYSIS AND BUSINESS PERFORMANCE EVALUATION

- The Three Financial Statements
- Ratio analysis and benchmarking
- Identifying earnings quality issues and adjustments

MODULE 3 - EARNINGS QUALITY & ADJUSTMENTS

- Rethinking the Budget: Driver-Based, Zero-Based and Rolling Forecast Approaches
- Forecasting What Matters: Building Revenue and Cost Driver Models
- Beyond Budgeting: Building a More Agile and Responsive Planning Model

MODULE 4 - FINANCIAL MODELING AND SCENARIO ANALYSIS

- Building Decision-Ready Financial Models: Three Statements, One Integrated View
- Modeling Uncertainty: Sensitivity, Scenarios and Monte Carlo Analysis
- From Model to Decision: Communicating Financial Scenarios to Leadership

MODULE 5 - CORPORATE PERFORMANCE MANAGEMENT AND KPI FRAMEWORKS

- Measuring What Matters: Designing Strategy-Aligned KPI Frameworks
- From Data to Decisions: Executive Dashboards and Management Reporting
- Explaining the Gap: Variance Analysis, Root Causes and Forward-Looking Insights

MODULE 6 - STRATEGIC COST MANAGEMENT AND PROFITABILITY ANALYSIS

- Cost structure analysis: fixed vs. variable, direct vs. indirect, and contribution margin frameworks
- Activity-based costing (ABC), product/customer profitability analysis, and cost allocation methodologies
- Zero-based budgeting (ZBB) and cost optimization: identifying inefficiencies and prioritizing resource allocation



PROGRAM AGENDA

MODULE 7 - CASH FLOW PLANNING AND WORKING CAPITAL MANAGEMENT

- Cash flow forecasting models: direct and indirect methods, short-term and long-term cash planning
- Working capital management: optimizing receivables, payables, and inventory to maximize free cash flow
- Liquidity stress testing and contingency funding planning for adverse operating scenarios

MODULE 8 - CAPITAL INVESTMENT AND FINANCIAL DECISION-MAKING

- Capital investment appraisal: NPV, IRR, payback period, and risk-adjusted return methodologies
- Capital allocation frameworks: portfolio approach to investment prioritization aligned to strategic objectives
- Post-investment review and benefits realization: linking capital expenditure to delivered financial outcomes

MODULE 9 - FP&A TECHNOLOGY, AUTOMATION, AND DATA ANALYTICS

- The FP&A technology landscape: planning platforms, EPM systems, BI tools, and emerging AI-driven forecasting solutions
- Automating FP&A processes: reducing manual effort in data consolidation, reporting, and variance analysis
- Leveraging predictive analytics and machine learning for more accurate and dynamic financial forecasting

MODULE 10 - RISK MANAGEMENT, COMPLIANCE, FINANCIAL GOVERNANCE, AND STRATEGIC BUSINESS PARTNERING

- Integrating financial risk identification, assessment, and monitoring into the FP&A cycle
- Financial governance frameworks: internal controls, compliance obligations, and the CFO's accountability agenda
- Strategic business partnering: the FP&A leader as trusted advisor to the CEO, board, and business unit leaders – communication, influence, and leadership in finance

EXAMINATION

YOUR CHARTER DESIGNATION



Chartered Institute of Professional Certifications' programs are unique as they provide you with professional charter designations and marks that can be used across your lifetime once you have completed our programs.

Upon completing the program and successfully passing the Chartered exam, you will be awarded the prestigious **Chartered Financial Planning and Analysis Manager (CFPA™)** designation, which you can showcase across your resume, CV, and professional credentials. Developed by the esteemed **Chartered Institute of Professional Certifications**, a leading authority in professional certification, this industry-recognized, trademarked charter validates your expertise in integrated financial planning, performance optimization, and strategic finance partnering. It affirms your ability to connect financial insights with organizational priorities, evaluate investment decisions with rigor, and guide senior leadership through structured financial analysis and recommendations.

The program's content has been independently accredited and certified by the Continuing Professional Development (CPD) organization, guaranteeing adherence to rigorous standards of professional development.

ABOUT US

49,525 Business Leaders Have Attained Their Chartered Certifications Since 2009

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Chartered Institute of Professional Certifications

All of Chartered Institute of Professional Certifications programs are fully accredited programs. The professional charters and designations are trademarked credentials that can only be used by professionals who have completed and passed our accredited program. It is also independently accredited by CPD as adhering to the highest standards of continuing professional principles.



OUR FACULTY DIRECTORS

We Collaborate With Instructors From Renowned Institutions

HARVARD UNIVERSITY

Wharton University of Pennsylvania

Stanford University

UNIVERSITY OF MICHIGAN

LSE THE LONDON SCHOOL OF ECONOMICS AND POLITICAL SCIENCE

Columbia Business School

London Business School



CONTACT US TODAY

We Thank You for Your Ongoing Support of Our Programs

Singapore and Asia Pacific Enquiries

Email: advisor@charteredcertifications.com
Phone: +65 6716 9980
Address: Chartered Institute of Professional Certifications
1 Gateway Drive
#20-04 Westgate Tower
Singapore 608531

Australia and New Zealand Enquiries

Email: advisor@charteredcertifications.com
Phone: +61 3 9909 7310
Address: Chartered Institute of Professional Certifications
530 Little Collins Street, Level 1
Melbourne VIC 3000, Australia

UK, Europe and Middle East Enquiries

Email: advisor@charteredcertifications.com
Phone: +44 (020) 335 57898
Address: Chartered Institute of Professional Certifications
86-90 Paul Street
London, EC2A 4NE

USA Enquiries

Email: advisor@charteredcertifications.com
Phone: +1 888 745 8875
Address: Chartered Institute of Professional Certifications
99 Wall Street #3936
New York, NY 10005