

Webinar on

Excel Spreadsheet Productivity Tips For Financial Advisors

Learning Objectives

- How to create built-in visual trend indicators into your reports*
- Setting up spreadsheets that are easy to use and understand*
- How Power Query can help you access multiple data sources*
- How Pivot Tables help you analyze data quickly and dynamically*
- How to detect and clean-up dirty data to ensure your information is accurate*



We'll explore dozens of financial functions in Excel, how to use them and how to avoid the associated pitfalls. Then we'll take the results of your calculations and show you how to set up simple dashboards to communicate the results of your analysis.

PRESENTED BY:

Tom Fragale is a computer professional with over 30 years of professional experience. He has trained over 30,000 business people in on-line webinars, public seminars, and on-site training.

On-Demand Webinar

Duration : 60 Minutes

Price: \$200

Webinar Description

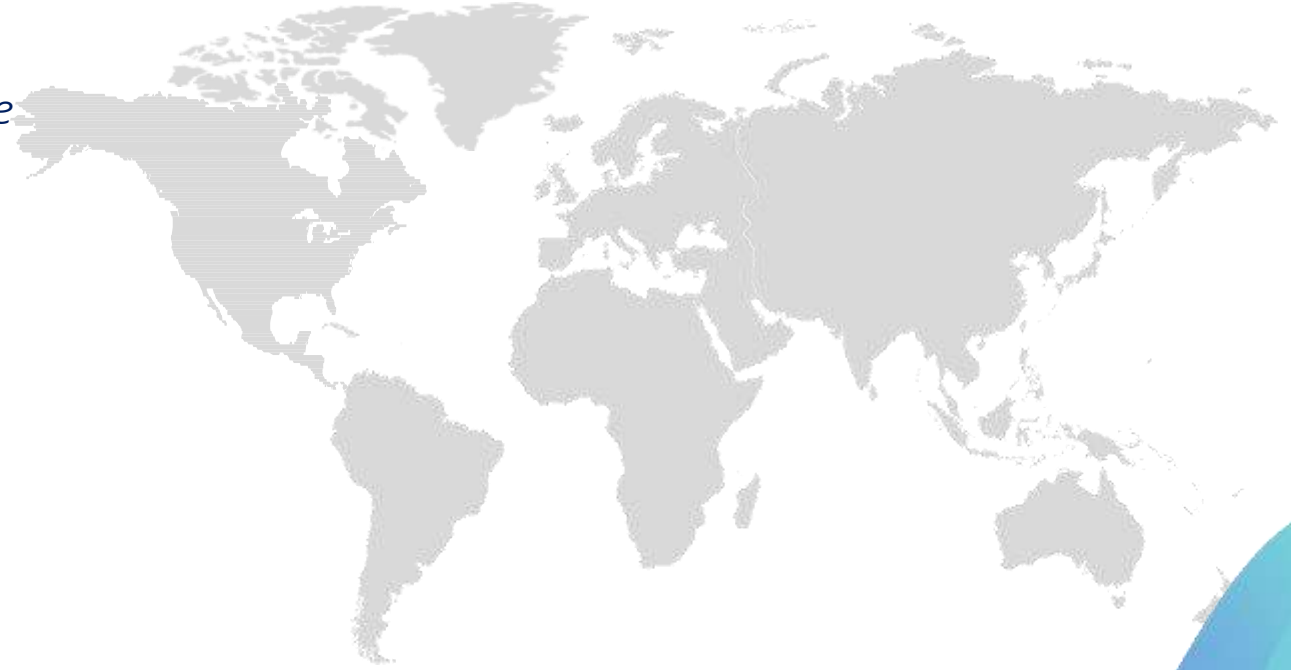
We'll explore dozens of financial functions in Excel, how to use them and how to avoid the associated pitfalls. Then we'll take the results of your calculations and show you how to set up simple dashboards to communicate the results of your analysis. Finally, we'll introduce you to Excel's Power Query function and how to leverage it with external data and data sources in Pivot Tables.

Excel was built for those in the financial industry. There are dozens of functions, formulas, and tools that can be used to evaluate profitability, debt performance, investment behaviors and more. Most people working in this application only know a fraction of what it can really do.



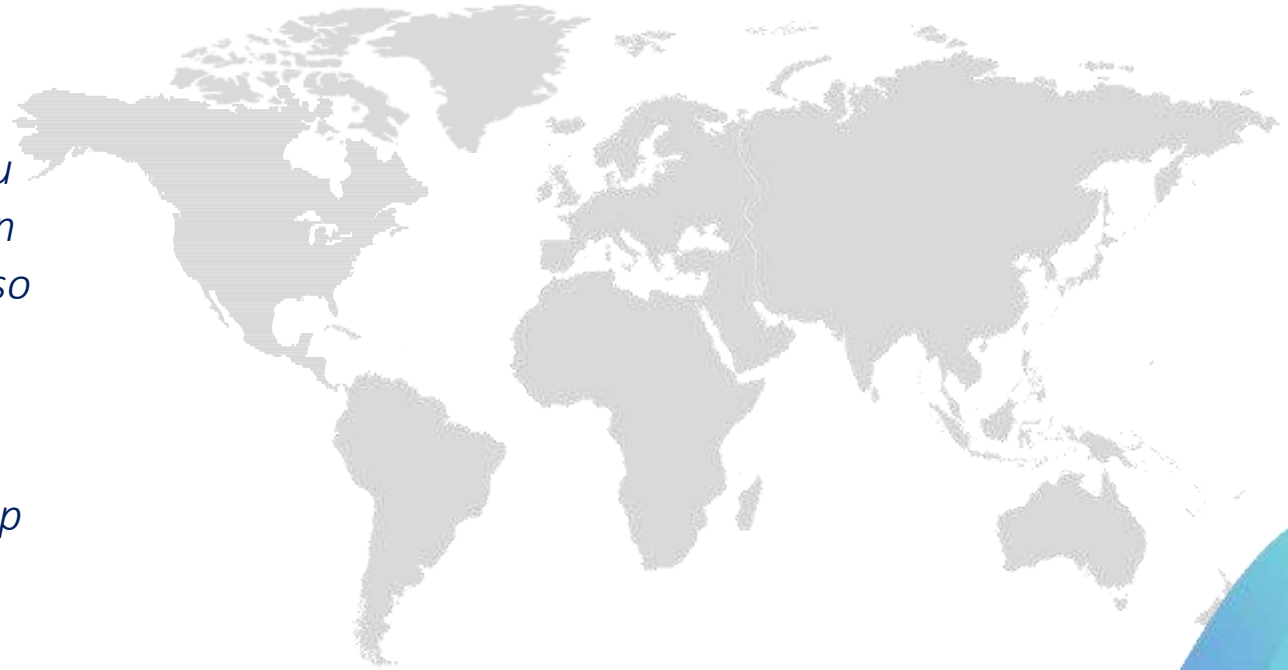
Who Should Attend ?

Data Analysts, Business Owners, Administrative Professionals, Business Analysis, Financial Analysis



Why Should You Attend ?

How many different tools are you using to evaluate financial performance data? Have you ever worked out a solution on a calculator, then typed it into Excel? What you do is important, so your time shouldn't be spent swapping applications and tools, and fighting with spreadsheets to delivery what your clients are expecting. Learn everything Excel can do to help you help others discover and understand their financial data.



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