

Finance, Accounting & Banking

Career Transformation Guide (2022 v2)



Careers-Salaries-Certifications-Publications-Forums

Success awaits you

Financial Certification Academy

Executive Summary

The mission of the [Financial Certification Academy \(FCA\)](#) is to equip Finance professionals worldwide to achieve their career goals by offering premier Certification and Training programs in Accounting & Audit, Banking, Blockchain, Corporate Finance, Crypto-Digital Assets, Financial Modeling, Risk Management & Fraud, Securities and Wealth Management. Certifications include FMVA, CPA, CCT, CBCA, CMSA, SIE and many more. We partner with the AICPA, Corporate Finance Institute (CFI), Wharton School (Online), New York Institute of Finance (NYIF), American Bankers Association (ABA), Independent Community Bankers of America (ICBA), ICI and the AACE International.

This new [Finance, Accounting and Banking - Career Transformation Guide \(2022 v2\)](#) includes valuable information that enables you to accelerate your career growth and income potential - Careers, Salaries (demand and growth), Certifications and Training programs, Publications and Portals along with Forums and Communities for professionals. The guide focuses on Accounting and Audit, Banking, Capital Markets and Securities, Corporate Finance, Financial Modeling, FinTech and Technology, Risk Management, Wealth Management along with C-Suite and Executive Education.

There are three critical success factors in our career transformation model. First, [Get Certified](#). Professionals with best in-class skill sets combined with industry-leading certifications advance more rapidly than your peers and typically earn 3%-5% above their colleagues. Second, [Get Published](#). Relevant, succinct and insightful articles on best practices in your technical domain or functional discipline enhance your credibility and integrity. And third, [Get Connected](#). Developing and maintaining a robust professional network - locally and globally - bolsters your career persona and positions you as the “go to” subject matter expert in your field.

So get started today. Our mantra is that “success awaits you!”.

(Note: Please see our [“Cryptocurrency and Digital Assets”](#) & [“Blockchain, Ethereum and Web 3”](#) - Career Transformation Guides).



I - Careers

Below are the most credible and popular sites for career opportunities including job openings and long-term career paths for Data Science, Data Engineering and Data Analyst professionals.

- [American Bankers Association](#)
- [Bank of England](#)
- [Blackrock](#)
- [Credit Suisse](#)
- [European Central Bank](#)
- [Fidelity](#)
- [Financial Times](#)
- [Goldman Sachs](#)
- [International Monetary Fund](#)
- [JP Morgan](#)
- [Lloyds of London](#)
- [Morgan Stanley](#)
- [PIMCO](#)
- [State Street](#)
- [US Federal Reserve](#)
- [Wall Street Journal](#)
- [World Bank](#)

II - Salaries



There are hundreds of titles and career paths for professionals in the global, multi-trillion dollar financial services sector. This Career Transformation Guide will address the three foundational domains of this sector - Finance (corporate finance and modeling), Accounting (including Auditing) and Banking. It will provide ancillary coverage of Risk Management, Securities trading and FinTech as well.

Some of the most common titles in these sub-sectors include:

Finance

- Corporate Finance Valuation Methods Professional Certificate (CFVMPC)
- Financial Analyst
- FP&A Analyst
- Financial Modeler
- Quantitative Methods for Finance Professional Certificate

Accounting

- Certified Public Accountant (CPA)
- Certified Management Accountant (CMA)
- Certified Cost Technician (CCT)
- Earn Value Professional (EVP)
- Financial Auditor

Banking

- Commercial Banker
- Certified Banking and Credit Analyst (CBCA)
- Certified Community Bank Compliance Officer (CCBCO)
- Certified Corporate Trust Specialist (CCTS)
- Chartered Investment Banking Analyst™ (CIBATM)
- Chartered Investment Banking Professional Certificate (CIBPC)
- Investment Banker

Risk Management

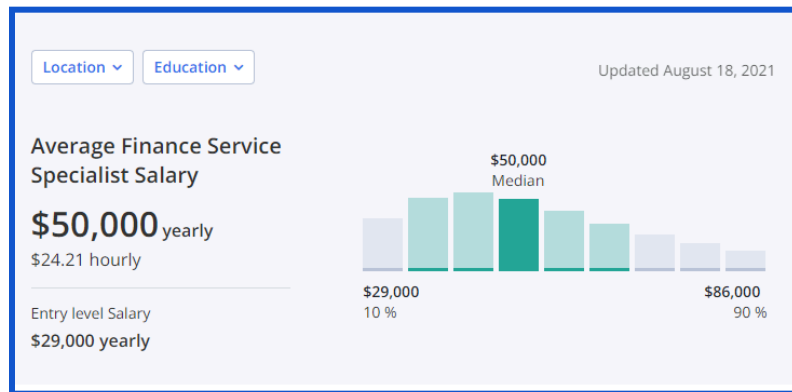
- Associate Professional Risk Manager
- Certified Anti-Money Laundering Specialist (CAMS)
- Hedge Fund Manager
- Risk Manager

Securities

- Capital Markets & Securities Analyst (CMSA)
- Capital Markets Professional Certificate (CMPC)
- Series 6 Broker

Three key factors influence salaries across the financial services sector. First is formal education (e.g. BS in Finance and MBA being the most common degrees) and professional Certifications (CPA, FMVA, CFP, and Series 6 license are the ubiquitous certs). Second, is location. New York City, London, Tokyo and San Francisco each have aggregate salaries above the US (or worldwide) averages. And third, tenure (years of experience/expertise). Salaries increase in direct correlation with seniority. Incomes for a freshly minted CPA are proportionately lower than the CFO of a Global 500 corporation.

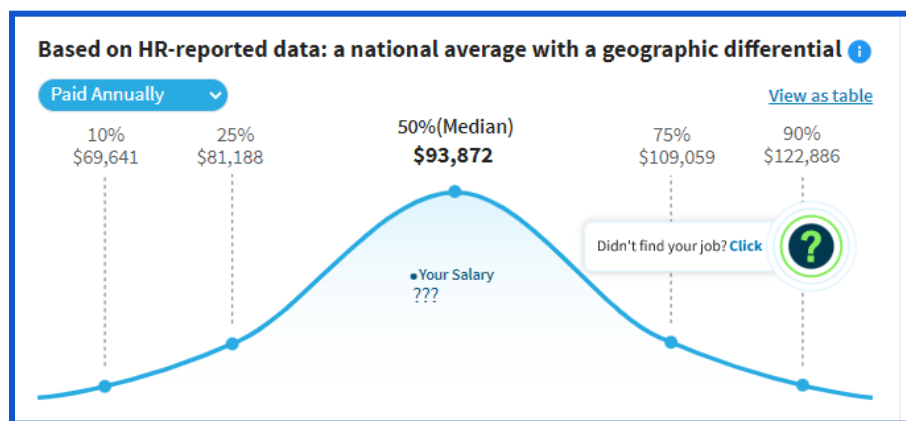
Spanning all functional areas of financial services, Zippia reports an average Financial Specialist (a generic, individual contributor) earns \$50,360 USD with an annual growth rate of 4% for the 89.697 job openings nationwide. (Source: Zippia Finance Service Specialist salary report)



[Glassdoor's Salary Calculator](#) reports that a typical Financial Analyst earns \$73,725

The average salary for a staff Accountant across the is \$55.925 according to [Indeed](#).

[Salary.com](#) reports that Commercial Bankers in the US earn an average \$39,872. (Source: [Salary.com Salary Calculator](#) - January 2022)



[ZipRecruiter](#) currently listed 657,750+ Risk Manager positions in the US alone.

The American Bankers Association published its most recent [Compensation and Benefits Survey](#) on November 12, 2021. This authoritative report found that during the 12 months that ended December 31, 2020, banks increased base salaries by an average of 3.4 percent. Moreover, six in 10 banks surveyed based their board compensation fees on attendance. Finally, most banks (87.5 percent) offered some type of bonus/incentive plan in 2020.

These salary figures are normative in this vast industry. Compensation for top tier Wall Street investment bankers and Silicon Valley venture capitalists can easily exceed these incomes by 5-10 fold.

III - Certification & Training



Accounting & Audit

Certified Public Accountant (CPA): Uniform CPA Examination and meet the education and experience requirements. The CPA designation helps enforce professional standards in the accounting industry. {AICPA}

Certified Cost Professional (CCP): Practitioner with advanced knowledge and technical expertise to apply the broad principles and best practices of Total Cost Management (TCM) in the planning, execution, and management of any organizational project or program. {AACE International}

Certified Cost Technician (CCT) : Demonstrated proficiency in the general skills and knowledge of the scheduling process within the AACE International Total Cost Management (TCM) framework. {AACE International}

Certified in Strategy and Competitive Analysis (CSCA): The CSCA complements and expands your strategic planning and analysis skills. {IMA}

Chartered Global Management Accountant (CGMA): Advanced proficiency in finance, operations, strategy and management. It is underpinned by extensive global research to maintain the highest relevance with employers, and develop competencies most in demand. {CIMA}

Earned Value Professional (EVP): Mastery of contract language as it relates to Earned Value application, the organization of a project's scope into meaningful structure for execution; planning scheduling and budgeting the project work from initiation through close out using an integrated cost/schedule tool; highly proficient in monitoring project progress for performance measurement. {AACE International}

Financial Accounting Professional Certificate (FAPC): Core financial accounting tools that will help you understand annual reports and footnotes - creating a solid understanding of the financial statements. {New York Institute of Finance}

Banking

Certified AML and Fraud Professional (CAFP): Practical experience in complying with U.S. laws and regulations and your ability to respond to a wide variety of financial crimes threatening your institution. {American Bankers Association}

Certified Banking and Credit Analyst (CBCA): Critical knowledge and skills required to become a skilled commercial banker or credit analyst, including accounting, industry analysis, business analysis, management assessment, financial analysis, loan security, credit evaluation and documentation, and review procedures. {Corporate Finance Institute}

Certified Commercial Loan Officer (CCLO): Develops the necessary credit skills to maintain and manage a commercial credit portfolio as well as the analytical processes needed to reach a conclusion about the borrower's repayment ability. {CCBIA}

Certified Community Bank Compliance Officer (CCBCO): Regulatory compliance a community bank Compliance Officer is responsible for. This program covers: Developing a Compliance Program, Lending, Deposit and Operations Compliance. {CCBIA}

Certified Community Bank Consumer Lender (CCBCL): Consumer lending decision and making sense of each step by covering the application process, financial statement analysis, credit analysis, loan structure, compliance, documentation procedures and closing. {CCBIA}

Certified Community Bank Credit Analyst (CCBCA): Credit analyst has evolved into a critical function in today's community banks. This program focuses on the necessary financial analysis skills needed by today's credit analysts, and addresses the additional expertise vital to a community bank's overall lending success. {CCBIA}:

Certified Community Bank Security Officer (CCBSO): Security Officer with critical information to meet regulatory requirements and provide strategic and tactical methods of security, robbery and fraud prevention and risk management. {CCBA}

Certified Community Bank Technology Officer (CCBTO): Manages and maximizes technology investments and shows IT managers and officers the solutions they can utilize to help strengthen existing IT capabilities, develop operational efficiencies and business continuity solutions. {CCBIA}

Certified Financial Marketing Professional (CFMP): Mastery of Data and Analytics, Leadership, Strategy, Revenue Generation, and more—critical skills for today's leaders in bank marketing. (American Bankers Association)

Certified Investment Banking Associate (CIBA): Learn about mergers and acquisitions (M&A) process, and evaluating firms based on various financial models. Participants will become familiar with how M&A works, different valuation methods and preparing debt and equity offerings. {Investment Certification Institute}

Certified IRA Services Professional (CISP): The CISP certification demonstrates your expertise in the IRA services field. (American Bankers Association)

Certified Private Equity Professional (CPEP): Developed by the Private Equity Investment Group, the structures of private equity, the intricacies of leverage buyouts, how to measure returns, and the relationship between general partners. {Investment Certification Institute}

Certified Regulatory Compliance Manager (CRCM): Differentiate yourself with a credential that sets the standard of professional expertise in the compliance field. (American Bankers Association)

Certified Retirement Services Professional (CRSP): Credential that sets the standard of professional expertise in the wealth and trust industry as a retirement services professional. (American Bankers Association)

Certified Trust and Fiduciary Advisor (CTFA): CTFA certification demonstrates your expertise in the trust and financial advisor field while recognizing the growing client relationship skills necessary to be a successful wealth manager. (American Bankers Association)

Chartered Investment Banking Analyst™ (CIBATM): The CIBATM curriculum comprises five Professional Certificates. Financial Accounting Professional Certificate, Credit Risk Analysis Professional Certificate; Corporate Finance and Valuation Professional Certificate; Financial Modeling Professional Certificate; and Mergers and Acquisitions Professional Certificate. (New York Institute of Finance)

Chartered Investment Banking Professional Certificate (CIBPC): Familiarity with US GAAP and IFRS accounting standards, learn how to value investment projects under conditions of uncertainty, acquire essential financial modeling skills, be able to assess the credit quality of companies and gain a thorough understanding of the M&A process from target company identification to funding strategies and deal structuring. {New York Institute of Finance}

Digital Banker Certificate (DBC): Digital and mobile tools available to customers and how to provide excellent customer service on digital and social platforms. {American Bankers Association}

Capital Markets & Securities

Capital Markets & Securities Analyst (CMSA)™: Core courses include: Financial Math for Capital Markets, Economics for Capital Markets, Bloomberg Essentials, courses include: Financial Math for Capital Markets. Intermediate courses address: Equity Markets, Fixed Income Fundamentals, Foreign Exchange, Commodities, Technical Analysis, Derivatives, Options, Swaps, Futures and Forwards. Electives cover: High Yield Bonds, Subordinated Debt, and Loans, Convertible Bonds, Short Duration Products, Hedge Fund Strategies and Behavioral Finance. This program is offered in both Full Immersion Instructor-Led and Self-Study formats. {Corporate Finance Institute}

Capital Markets Professional Certificate: Training modules address: 1) Money Markets, Foreign Exchange & Time Value of Money - Major Capital Markets, Introduction to Money Markets, Foreign Exchange, Time Value of Money; Bond and Equity Markets and Financial Regulation - Bond Markets, Bond Issuance Risks, Equity Securities, Equity Markets & Trading, Regulation of Financial Markets; Equity Indexes, Valuations and Investment Vehicles; Derivatives, Future, Swaps and Options; Credit Derivatives, Equity and Bond IPO - Credit Derivatives, and Equity and Bond IPO Participants | Timing and Major Steps in IPO Process; and Capital Markets Professional Certification Examination. {New York Institute of Finance}

Corporate Finance

Corporate Finance: Know Your Numbers Program prepares you for responsible and sustainable leadership from a financial management perspective. Training modules address: Time value of money and discounted cash flow analysis, Valuation of financial securities, Estimating enterprise value, Estimating enterprise value, and Application of financial valuation tools. {Macquarie University}

Corporate Finance Valuation Methods Professional Certificate (CFVMPC): Key principles of project analysis, budgeting, and valuation decide a firm's optimal capital structure. {New York Institute of Finance}

Financial Modeling and Valuation Analyst Certification: Program includes 24 courses, certificates, PitchBook Data access, one-on-one financial model feedback, extra case studies, and more. The most practical online qualification in corporate finance and CFI's most comprehensive bundle to date. Developed for finance professionals looking to gain a competitive edge in the financial industry, the FMVA™ Full Immersion bundle provides a comprehensive program with real insights into tasks faced by financial analysts on a daily basis. {Corporate Finance Institute}

Introduction to Corporate Finance Key concepts and applications include: time value of money, risk-return tradeoff, cost of capital, interest rates, retirement savings, mortgage financing, auto leasing, capital budgeting, asset valuation, discounted cash flow (DCF) analysis, net present value, internal rate of return, hurdle rate, payback period. {Wharton Online}

Financial Modeling and Valuation Analyst (FMVA): Bridge between where you are now and where you want to be – from a beginner to an experienced world-class financial analyst with the confidence, and skills to match. {Corporate Finance Institute}

Online Professional Certificate in Valuation (OPCV): Corporate Finance, Mergers and Acquisitions, Business Valuation, Financial Statement Analysis. Students will receive a solid grounding in Valuation. {New York Institute of Finance}

Professional Certificate in Corporate Finance: Learn to Identify elements of corporate investment projects, Recognize elements and sources of corporate financing., Identify factors affecting the flow of corporate funds, Relate the Efficient Markets Hypothesis (EMH) to corporate financial decision making. {New York Institute of Finance}

Financial Modeling

Financial Modeling : This program enables you to assess and manage long-term projects requiring a thorough analysis, negotiations with investors, lenders, and partners. Introduction and general principles - forecasts, costs, investments, reports, charts and CAPEX;. Reports and Financing - work with three main financial reports and understand relations between project assumptions and those reports, choose a target capital structure, model a loan and generate an acceptable schedule to repay the loan, Analysis and Presentation - Discounted cash flow analysis is a vital part of financial models for any capital investment – therefore the whole model is often called DCF model; calculate such important indicators as NPV or IRR, and Capstone Project. {Coursera}

Quantitative Methods for Finance Professional Certificate: Provides fundamental desk-ready skills essential for quantitative roles in finance, including trading, structuring, valuation, risk management, regulation and financial engineering. Learn all the mathematical techniques, Excel tools, VBA programming skills and numerical methods that you need to succeed. This Professional Certificate comprised of Mathematics, Probability and Statistics for Finance, Introduction to Programming for Finance, and Numerical Methods for Finance. Gain insights into the structure of stochastic processes and the implications for derivatives pricing, essential techniques of statistical inference for finance, learn regression analysis in Excel, become a proficient VBA programme and proficient use of Monte Carlo

techniques and finite difference methods to price securities and compute risk measures.
{New York Institute of Finance}

FinTech & Technology

Advanced Trading Algorithms Building robust back testing systems and algorithms, Sharpe ratio, Treynor's Ratio and Jensen's Alpha, Accruals: understand the basics of accrual, build a trading strategy based on accruals and test the strategy that you have built, Betting against Beta, Strategy - Momentum & Momentum Crashes, G Score: understand the meaning of G Score, build a trading strategy based on G Score and test the strategy that you have built. {International School of Business}

Artificial Intelligence for Trading: Learn the basics of quantitative analysis, including data processing, trading signal generation, and portfolio management. Use Python to work with historical stock data, develop trading strategies, and construct a multi-factor model with optimization. Complete real-world projects designed by industry experts, covering topics from asset management to trading signal generation. Master AI algorithms for trading, and build your career-ready portfolio. Training modules include: 1) Quantitative trading, 2) Stocks, Indices and ETFs, 3) Factor Investing and Alpha Research, 4) Sentiment Analysis with Natural Language Processing, NLP with Deep Learning, 5) Combining Multiple Signals, and 6) Simulating Trades with Historical Data (back-testing). {Udacity}

Building Trading Algorithms With Python: Creating a full-fledged trading bot that investors and traders find useful. Programmers who have a basic knowledge of trading in traditional assets and wish to develop their own trading bots will find that this course addresses their core concerns and shows how to go about designing and developing a trading bot, Basics of a Universal Trading Bot, Building an Automated Stock Trader, Building a Bot for Traditional Asset Trading, and Building Your Own Forex Trading Bot in Python. This code for this program is hosted on GitHub. {Udemy}

Electronic Trading in Financial Markets: Study of the impact of technology on financial market systems. The course provides students with a basic foundation in market structure (what is 'liquidity?') before building to introduce electronic trading fundamentals (order books) and advanced electronic

trading techniques (algorithmic trading), Fundamentals of Market Structure & Electronic Trading, Mechanics of an Order Book, Advanced Electronic Trading, Electronic Trading in Fixed Income, and Innovation Guidelines. {New York Institute of Finance}

Future of Payment Technologies: Learn new ways of making payments from consumer-to-business (C2B), from consumer-to-consumer (C2C), and from business-to-business (B2B). Explore current payment system technologies to examine their strengths and weaknesses, and understand the ways technological innovation is changing these traditional systems and new front-end innovations like digital wallets and mobile payments and also discover back-end innovations like tokenization, mobile money, and new payment infrastructure, Introduction and What is FinTech?, Digital Wallets, Credit Card Innovations, and Payment Technology in Emerging Markets. {University of Michigan}

Innovations in Investment Technology - Artificial Intelligence: Learn about AI-driven online wealth management platforms, robo-advisors, and learn how they work and why they're successful. Moving from human-based data-driven investing strategies to neural networks, you'll assess the ability of artificial intelligence to make investment decisions and discover the role of AI and machine learning in making trading decisions. Recognize the strengths and weaknesses of human financial advisors and investors., Explain the business model of robo/AI-advisors, Identify the relationship between identifiable firm characteristics and average returns, and Build a diversified portfolio based on attitudes toward risk. {University of Michigan}

Machine Learning in Trading and Finance: Quantitative trading, pairs trading, and momentum trading. You will be able to design basic quantitative trading strategies, build machine learning models using Keras and TensorFlow, build a pair trading strategy prediction model and back test it, and build a momentum-based trading model and back test it. You should have advanced competency in Python programming and familiarity with pertinent libraries for machine learning, such as Scikit-Learn, StatsModels, and Pandas. {New York Institute of Finance and Google Cloud}

Machine Learning and Reinforcement Learning in Finance Specialization: Equips you to compare ML for Finance with ML in Technology (image and speech recognition, robotics, etc.) , describe linear regression and classification models and methods of their evaluation, explain how Reinforcement Learning is used for stock trading , and learn approaches to modeling market frictions and feedback effects for option trading.. Build high-demand skills in Predictive Modeling, Financial Engineering, Machine Learning, Tensorflow, Reinforcement Learning, Option pricing and risk management, Simple model for market dynamics, Q-learning using financial problems, Optimal trading, and Portfolio Optimization. {New York University}

Trading Algorithms: Trading strategies that work in emerging markets. The seven include strategies based on momentum, momentum crashes, price reversal, persistence of earnings, quality of earnings, underlying business growth, behavioral biases and textual analysis of business reports about the company. Trading Strategies and Benchmarks, How to read an academic paper, F Score and PEAD. {International School of Business}

MQL5: Creating Trading Robots And Indicators: Introduces the practical use of MetaQuotes Language 5 (MQL5) - the programming language of technical indicators, trading robots and helper applications for automating trading in financial markets using the MetaTrader 5 trading platform. You will learn how to create MQL5 applications using both procedural programming and object-oriented programming, and get acquainted with the general structure and properties of technical indicators - MQL5 applications designed to analyze quotes of currencies and stocks. {Udemy}

Wharton's Fintech Specialization: Introduce you to the fundamental building blocks of financial technologies and real-world applications from complex regulations to cryptocurrency to portfolio optimization. FinTech: Foundations, Payments, and Regulations, Cryptocurrency and Blockchain: An Introduction to Digital Currencies, Lending, Crowdfunding, and Modern Investing, and 4) Application of AI, InsurTech, and Real Estate Technology - learn about the emerging technologies in Artificial Intelligence and Machine Learning that are utilized in InsurTech and Real Estate Tech. {Wharton Online}

Risk Management

Advanced CAMS-Audit (ACAMSA): Equip mid-level and senior management professionals with the knowledge to reinforce internal controls and enhance your ability to meet regulatory expectations. {Association of Certified Anti-Money Laundering Specialists}

Advanced CAMS-Financial Crimes Investigations (CAMS-FCI): Prove your existing investigation skills and build on your ability to effectively communicate suspicious activity. {Association of Certified Anti-Money Laundering Specialists}

Advanced CAMS-Risk Management (CAMS-RM): Global certification that demonstrates a professional's specialized knowledge in managing financial crime risk. {Association of Certified Anti-Money Laundering Specialists}

Advanced Risk Management Professional Certificate: Advanced Risk Management Tools and Concepts - Why risk management?, Risk assessment vs. risk management, Taxonomy of Risks, Review of Quantitative Tools, Market Risk Management, Credit, Liquidity and Operational Risk Management: Credit Risk, Counterparty Credit Risk, Counterparty Credit Risk, Credit Risk Management, and Liquidity Risk Management., Risk Capital and Enterprise Risk Management - Equity Risk, Fixed Income Risk, Derivatives Risk, Measuring Market Risk with Historical Data. {New York Institute of Finance}

Associate Professional Risk Manager (Associate PRM) {Professional Risk Management International Association}: Auditing, accounting, legal, and systems personnel who want to understand fundamental risk management methods and practices. {PRMIA}

Certified Anti-Money Laundering Specialist (CAMS): CAMS is an established global qualification that outlines the key principles of money laundering, and how to prevent it. {Association of Certified Anti-Money Laundering Specialists}

Certified AML FinTech Compliance Associate (CAFCA): Protect your organization, by ensuring they understand core compliance principles, functions, and risks. A fully certified team also demonstrates that your business takes financial crime risks seriously.

Certified Enterprise Risk Professional (CERP): CERP certification demonstrates your expertise in the enterprise risk field. {American Bankers Association}

Certified Global Sanctions Specialist (CGSS) {Association of Certified Anti-Money Laundering Specialists}: Defines the body of knowledge underlying sanctions compliance, with a focus on the concepts, legal frameworks, regulator expectations, and established best practices.

Certified Know Your Customer Associate (CKYCA) {Association of Certified Anti-Money Laundering Specialists}: Responsible for onboarding clients, conducting periodic reviews and updating customer profiles, as well as those who supervise them.

Certified Transaction Monitoring Associate (CTMA) {Association of Certified Anti-Money Laundering Specialists}: Knowledge of transaction monitoring processes. For institutions, certifying employees with CTMA represents a significant commitment to AML and financial crime compliance in a world of increasingly complex laws, regulations, and policies.

Credit and Counterparty Management (CCRM) {Professional Risk Management International Association}: Deep, practical understanding of credit risk analysis frameworks and how to deploy them and act on them in practice in financial institutions.

Credit Risk Analyst Professional Certificate (CRAPC) {New York Institute of Finance}: Credit risk fundamentals with the tools and techniques required to perform a credit analysis - utilizing analytical tools to project future performance.

Financial Risk Manager (FRM) (Global Association of Risk Professionals): Skills are up to the latest international standards, and connects you to an elite network of expert risk professionals employed by the world's leading institutions.

Financial Risk Management with R: Using the R programming language with Microsoft Open R and RStudio, you will use the two main tools for calculating the market risk of stock portfolios: Value-at-Risk (VaR) and Expected Shortfall (ES). Gain skills in Risk Analysis, R Programming, Risk Management, Financial Risk and Portfolio (Finance), Introduction to R, Data Retrieval, and Return Calculation, Risk Management under Normal Distribution, Risk Management under Non-normal Distributions, Risk Management under Volatility Clustering - test for the presence of volatility clustering, and how to calculate value-at-risk (VaR) and expected shortfall (ES) when returns exhibit volatility clustering.. {Duke University}

Market Liquidity and Asset Liability Risk Management Certificate (MLARM) {Professional Risk Management International Association}: In-depth, practical understanding of these areas of risk management, their frameworks, and various measurement methodologies in financial institutions.

Professional Risk Management International Association: Deep and practical understanding of these areas of risk management, their frameworks, and various measurement methodologies in financial institutions.

Operational Risk Management Certificate (ORM) {Professional Risk Management International Association}: Operational risk management frameworks and measurement methodologies in financial institutions. Successful candidates will be better prepared to implement meaningful risk assessment initiatives, produce useful risk management information and understand basic modeling techniques for operational risk measurement.

Risk Management Professional Certificate (RMPC): Risk management tools and techniques are reviewed and financial regulation is covered. Delegates will work through the annual risk report of a publicly traded financial institution. {New York Institute of Finance}

Risk Management Professional Certificate: Program presents a comprehensive survey of the practice of Risk Management. The major types of risk are identified, risk management tools and techniques are reviewed and financial regulation is covered. Delegates will work through the annual risk report of a

publicly traded financial institution. A number of case studies are analyzed to illustrate key principles of risk measurement and management. {New York Institute of Finance}

Wealth Management

Capital Markets & Securities Analyst (CMSA): Financial Math for Capital Markets, Economics for Capital Markets, Bloomberg Essentials, Equity Markets, Fixed Income Fundamentals, Foreign Exchange, Commodities, Technical Analysis, Derivatives, Options, Swaps, Futures and Forwards {Corporate Finance Institute}

Certified Banking & Credit Analyst (CBCA): The 5 C's of Credit, Business Plans, Drivers of Business Growth, Cash Flow Cycles, 3 Statement Financial Model, Loan Security and Covenants {Corporate Finance Institute}

Certified Bitcoin Expert (CBE): Blockchain to P2P networks, regulations around bitcoin, bitcoin working & its units and how to buy bitcoins. Certified Bitcoin Expert™ certifies individuals in the bitcoin discipline of Distributed Ledger Technology {Blockchain Council}

Certified Blockchain and Finance Professional (CBFP): Master how Blockchain can be leveraged to speed up and streamline the procedure of cross border payments and to reduce the cost {Blockchain Council}

Certified Cryptocurrency Expert (CCE): Learn about the strategies for making optimal trading decisions in the bustling Crypto market, participants will also learn about the fundamentals of the technological infrastructure that powers Blockchains behind the scenes. {Blockchain Council}

Certified Cryptocurrency Trader™ (CCT): Learn Crypto Trading with Real Money in CoinDCX, making optimal trading decisions in the bustling Crypto market, participants will also learn about the fundamentals of the technological infrastructure that powers Blockchains {Blockchain Council}

Certified Public Accountant (CPA): CPA license is the foundation for all of your career opportunities in accounting. To get your license, keep 3 E's in mind: education, examination and experience - program includes video lectures, quiz generator, exam simulator, digital flashcards, CRAM courses {Yaeger CPA Review}

Financial Modeling & Valuation Analyst Certification (FMVA): Financial planning and analysis, 24 courses, certificates, PitchBook Data access, one-on-one financial model feedback, extra case studies {Corporate Finance Institute}

Financial Risk Management Certification (FRM): Risk management - daily questions, instructional videos, learning spreadsheets, online forum-FRM and Global Association of Risk Professionals

Professional Certificate in Wealth Management: Equips you with the components of client profiling, asset management techniques, estate and tax planning, and examines solutions at a high level. - Wealth Management, Estate Planning, Trusts, 4) Financial Planning, Hedge Funds, Mutual Funds, Commodity and Energy Markets, Portfolio Management I & II, Money and Banking, and Antimony Laundering, (New York Institute of Finance)

Securities Industry Essentials - SIE Certification Exam: Brokerage and securities trading - SIE exam review course, exam preparation software, video class {Securities Institute of America}

IV - C-Suite & Executive Education



Advanced Equity Valuation Techniques Learn how to use equity valuation techniques that use common models to assess stocks and calculate corporate value. Earn CPE Credits: 1. Learn to Identify three dividend discount models, Calculate corporate value and List key elements of the Capital Asset Pricing Model. This program is ideal for junior portfolio managers, money managers, research analysts, individual and institutional investors, private bankers and financial advisors, research staff of pension boards and plan sponsors. {New York Institute of Finance}

Advanced Valuation and Strategy - M&A, Private Equity, and Venture Capital program will revolutionize your way of decision making, by extending static techniques from corporate finance with dynamic methods to quantify strategic thinking. Traditionally, we assess the attractiveness of an investment as a mature business, where future cash flows mainly result from past decisions. But, in an ever-changing world, strategic decisions determine the firm's long-term success and market value.. The treatment goes far beyond the use of standard valuation analysis. We introduce the expanded NPV, which brings together DCF, real options, and game theory. Thinking in terms of options, games, and adaptive strategies may help managers address strategic questions such as: How do you value a leveraged buyout? How can you value a high-tech venture with negative cash flows? When should you invest in new ventures in stages? How can you incorporate rival bidders in the analysis? This course is particularly interesting for venture capitalists, private equity investors, investment bankers, CEOs and CFOs, Skill-based training modules include: 1) Discounted Cash Flow Analysis - apply DCF approaches and provide case applications illustrating the powerful potential of this valuation methodology, 2) Corporate Strategy - close the gap between traditional corporate finance and strategic planning by linking corporate strategy to the market value. We can assess the value of a company through the

expanded NPV criterion, which is able to capture the value of the firm's growth options, 3) Corporate Real Options - the basic concepts and valuation principles of real options. Real options theory quantifies decision making under uncertainty and stresses the importance of wait-and-see flexibility, suggesting that managers should wait until major uncertainties are resolved and the project is more clearly beneficial. Since it recognizes that investments tend to be sequentially related over time, real options analysis is particularly suitable for valuing strategies in addition to isolated projects, and 4) Option Games - principles of game theory, which are essential for our understanding of strategic decisions.. After this module you will be able to quantify the strategic component in the strategic growth option value. {Erasmus University}

Certified Post Merger Integration Expert (CPMI): Addresses the needs of advisors, Human Resource professionals, Project Managers, management consultants, change specialists, corporate M&A and integration teams. The program covers all aspects of the post-merger integration process from planning to implementation. The CPMI program is the only globally oriented Post Merger integration certification in existence and is internationally recognized. {IMAA}

Financial Engineering and Risk Management Specialization: Develop a systematic, data-driven approach to formulating modeled returns and risks for significant asset classes and optimal portfolios and Back test and implement trading models and signals in an active, live trading environment. Build highly marketable skills in Quantitative Analysis, Asset Allocation, Algorithmic Trading, Portfolio Optimization, Mathematical Finance, Derivatives, Swaps and options, Fixed Income, Binomial Distribution, Black Scholes Models, Model Calibration and pricing Credit Default Swaps, Introduction to Financial Engineering and Risk Management, Term-Structure and Credit Derivatives, Optimization Methods in Asset Management, Advanced Topics in Derivative Pricing, and Computational Methods in Pricing and Model Calibration ... plus an Applied Learning Project. {Columbia University}

Professional Certificate in Valuation Equips you to implement valuation concepts and principles from Corporate Finance, Mergers and Acquisitions, Business Valuation, Financial Statement Analysis - valuation approaches, finance theory and practical applications to help managers understand key concepts that underlie analysis and execution of financial decisions - Corporate Finance - The Financing

Decision, Time Value of Money, More Time Value Applications, Capital Budgeting Overview, Financial Statement Analysis - Introduction to Financial Statements, Risk Analysis Using Ratios, The Impact of Accounting Principles, Valuation Basics, Business Valuation - Introduction to Business Valuation - Foundations of Free Cash Flows, Weighted Average Cost of Capital, Terminal Value, DCF Approach to Business Valuation, Limitations of the DCF Approach, Mergers and Acquisitions - Overview of Mergers and Acquisitions, Risk Considerations for Mergers and Acquisition, Valuing the Acquisition Candidate, Financing the Acquisition, Integrating the Acquisition, Equities - Common Stock, Preferred Stocks, Equity Linked Issues, Indexes, Fixed Income Securities - Bonds and their Features, Fixed Income Marketplace, Fixed Income Regulatory Environment Derivative Instruments Basics of Forwards and Futures - Introduction to Options, Trading Derivatives, Introduction to Swaps, and Corporate Credit Analysis - Introduction to Corporate Credit Analysis, {New York Institute of Finance}

Foundational Finance for Strategic Decision Making Specialization: Learn the structure and basics through assignments and tests that are introductory in nature but with real-world applications. Gain high-demand skills in Financial Analysis, Estimation of costs and benefits, Spreadsheet Analysis, Value estimation, Financial Forecast, Developing Financial Models, Pricing Stocks, Trading in Financial Markets and Pricing Bonds, Time Value of Money (TVM), Advanced Concepts in Time Value of Money, Stocks and Bonds - explore the structure and pricing of stocks and bonds at an introductory level. In this course, you will learn about bonds, different types of bonds (Zero Coupon bonds, Government bonds), and Advanced Understanding of Stocks and Bonds - advanced aspects of bonds and stocks that will help you make smart personal decisions and develop a keen understanding of how governments and companies borrow from us. {University of Michigan}

Mergers and Acquisitions – The Relentless Pursuit of Synergy: The key to any M&A transaction is value creation via synergistic activity.. Of special importance are the correct valuation, proper financing, and actual deal completion. But this is not the end – value mostly accrues from the post-merger integration. Why M&As? Stakeholders, Framework and Process. Legal and Regulatory Environment. Accounting and Tax Issues an Overview, Strategy and M&As. Theories of M&As, Valuation of M&As - discuss and compare alternative approaches to valuation, paying special attention to free cash flow (FCF) valuation. Analyze major value drivers – profitability, growth, cost of capital etc. and derive

general valuation formulas for special cases of no growth, constant and supernormal growth. Then we apply the formulas to analyze value gains/losses in M&A transactions on examples, and 4) M&A Financing. LBOs and MBOs - discuss both facts and myths about junk bonds. {American Institute of Business and Economics}

Valuation Training: Provide the fundamentals of each approach to valuation, together with limitations and caveats on the use of each, as well as extended examples of the application of each. At the end of the seminar, participants should be able to: Value any kind of firm in any market, using discounted cash flow models (small and large, private and public), Value a firm using multiples and comparable firms, Analyze and critique the use of multiples in valuation, Value “problem” firms, such as distressed companies or startups, and Estimate the effect on value of restructuring a firm. {IMAA}

Wharton Business and Financial Modeling Capstone: Training includes Yahoo Finance, optimal risky portfolio on the efficient frontier, Capital Asset Pricing Model (CAPM) tables, and creating an asset allocation with final presentation; this program uses the Wharton Research Data Services (WRDS), you will implement quantitative models for optimal success and minimal risk. {Wharton Online}



V - Publications & Portals

- [Accenture](#)
- [American Institute of CPAs](#)
- [American Bankers Association](#)
- [Bank of England](#)
- [CBOE](#)
- [CME Group](#)
- [Corporate Finance Institute](#)
- [CPA.com](#)
- [European Central Bank](#)
- [Financial Modeling Institute](#)
- [Harvard Business Review](#)
- [International Monetary Fund](#)
- [Knowledge at Wharton](#)
- [Market Watch](#)
- [Moody's Analytics](#)
- [National Venture Capital Association](#)
- [New York Institute of Finance](#)
- [S & P Global](#)
- [Seeking Alpha](#)
- [US Securities & Exchange Commission](#)
- [World Bank](#)

VI - Professional Forums & Communities



- [American Bankers Association - Discussion Groups \(Online\)](#)
- [American Institute of CPAs - AICPA \(Twitter - 64k members\)](#)
- [Banking Exams \(Facebook/Meta - 45k members\)](#)
- [CBOE Risk Management Conference](#)
- [Finance & Cost Accounting \(Facebook/Meta - 68k members\)](#)
- [Financial Times Live](#)
- [FinTech & Digital Finance \(LinkedIn - 254k members\)](#)
- [Money 20/20 Global](#)
- [Natural Capital Accounting Forum \(World Bank\)](#)
- [Thomson Reuters SYNERGY](#)
- [Wall Street ELITE \(Reddit - 431k members\)](#)
- [World Economic Forum](#)

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- [Artificial Intelligence-Machine Learning-Deep Learning](#)
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