

## Advanced Excel for Finance Professionals

### TARGET AUDIENCE

Intermediate users of Excel

### PREREQUISITES

Intermediate knowledge of Excel

### DURATION

2 days

### CONTINUING ED CREDITS

18 CE Credits

### PRICING

\$ 999

### ADDITIONAL BENEFITS

12-month access to Excel crash course  
– valued at \$69

Lifetime subscription to Boost Pro  
Excel add-in – valued at \$199  
(<http://wspanalytics.com/>)

### Overview

This seminar is designed for intermediate Excel users who would like to power-charge their productivity in Excel, by introducing lesser-known but highly-effective functionality. This course is applicable to all PC versions of Excel, and identifies where differences exist between versions.

### Boost add-in for Excel

This course will extensively utilize Wall Street Prep's Boost Excel add-in, a comprehensive suite of over 100 time-saving keyboard shortcuts, formatting, and auditing tools designed specifically for people who build financial models in Excel.

#### Modeling best practices

- Introduction to macros & distribution of Boost for Excel
- Basic Excel setup including macro security, iterations & calculations settings
- Customizing toolbars in Excel (including adding icons to your toolbar)
- Excel best practices, including common "shortcut" keys and other efficiency tips
- Understanding how to efficiently design historical inputs & forecast financial projections
- Best practices for building formulas (auto sum, filling, anchoring)
- Auditing formulas and cell references

#### Power-charged formatting and presentation

- Utilizing shortcuts and power keys (special WSP add-in included)
- Using data validation to create scenario toggles
- Incorporating INDEX, MATCH, CHOOSE functions to power-charge toggles
- Dynamic formatting, bordering by combining Styles and Go to Special functionality

#### Power-charged data analysis

- Building data tables and presentation best practices
- Using pivot tables

#### Advanced modeling topics

- Understanding and controlling for circular references
- Building effective Dashboards into analysis and using switches
- Error-proofing analysis presented in Excel
- Auditing effectively across multiple sheets and files in Excel
- Finding and removing phantom links
- Finding and removing unused names
- Handling too many formats in Excel and reducing file size

#### Management and manipulation of large data sets

- Importing and cleaning of data from various sources
- Helpful functions in data management (text to columns, LEFT, RIGHT, MID, PROPER, TRUNC, CONCATENATE, SEARCH, FIND, RANK, date functions, converting to numbers,
- Tips and tricks, best practices (e.g., saving in .xlsb, manual calculation, etc)