



February 2026

 Finance

Course Catalogue

Finance Course Catalogue

Finance

Course Title	Modality	PD Hours
Certificate in Non-Profit and Charity Financial Compliance and Strategy (Instructor Led)	Certificate & Executive Programs	10 PD Hours
CFO Program: Leading the Finance Function of the Future (Instructor Led)	Certificate & Executive Programs	18 PD Hours
AI for Finance Bundle	On Demand Bundle	13 PD Hours
Certificate in Financial Markets and Innovation	On Demand Certificate	10 PD Hours
Advanced Prompting for Financial Statement Analysis	On Demand (eLearning)	1.5 PD Hours
Compensation for Women: Earn What You Deserve (Audio)	On Demand (eLearning)	1 PD Hour
Controllership: Operational Management	On Demand (eLearning)	7 PD Hours
Corporate & Business Strategy	On Demand (eLearning)	7.5 PD Hours
Financial Storytelling: The Key in Growing Your Organization to the Next Level (AICPA)	On Demand (eLearning)	2 PD Hours
Foundations of Machine Learning and Deep Learning for Finance	On Demand (eLearning)	2 PD Hours

Finance (cont.)

Course Title	Modality	PD Hours
Introduction to AI in Finance	On Demand (eLearning)	1.5 PD Hours
Leading the Finance Function of the Future: Accelerator (Audio)	On Demand (eLearning)	1 PD Hour
Mining Financial Model and Valuation	On Demand (eLearning)	5 PD Hours
The 7 Secrets to Powerful Financial Presentations	On Demand (eLearning)	2.5 PD Hours
The AI-Ready CPA: Leading Finance Through Change (AICPA)	On Demand (eLearning)	1.5 PD Hours
Controllershship: Operational Management	Online Seminar	7 PD Hours
Powerful Financial Analysis with AI and BI	Online Seminar	7.5 PD Hours

Corporate Finance

Course Title	Modality	PD Hours
<u>Certificate in Liquidity and Fund Management for SMEs (Instructor Led)</u>	Certificate & Executive Programs	10 PD Hours
<u>Certificate in Master Controllershship (Instructor Led)</u>	Certificate & Executive Programs	18 PD Hours

Corporate Finance (cont.)

Course Title	Modality	PD Hours
Corporate Finance and Controllers Conference: 2026 Strategies for Growth and Innovation (In Person)	Conferences	14 PD Hours
Corporate Finance and Controllers Conference: 2026 Strategies for Growth and Innovation (Virtual)	Conferences	14 PD Hours
Cash Flow and Business Strategy Bundle	On Demand Bundle	15.5 PD Hours
Financial Resilience and Strategic Planning Bundle	On Demand Bundle	26 PD Hours
2025 Hot Topics for CFOs and Controllers	On Demand (eLearning)	4 PD Hours
3-Statement Modeling	On Demand (eLearning)	6.5 PD Hours
AI-Powered Scenario Analysis	On Demand (eLearning)	2 PD Hours
Application of Cost of Capital	On Demand (eLearning)	5 PD Hours
Auditing and Balancing a 3-Statement Model	On Demand (eLearning)	2 PD Hours
Business Valuations: Advanced	On Demand (eLearning)	7.5 PD Hours
Business Valuations: Fundamentals	On Demand (eLearning)	7.5 PD Hours

Corporate Finance (cont.)

Course Title	Modality	PD Hours
Capital Budgeting	On Demand (eLearning)	2 PD Hours
Cash Flow Cycles and Analysis	On Demand (eLearning)	2.5 PD Hours
Corporate Finance Fundamentals	On Demand (eLearning)	2.5 PD Hours
Debt Securities: Drivers of Bond Valuations	On Demand (eLearning)	2 PD Hours
Debt Securities: Pricing, Valuations and Risk	On Demand (eLearning)	2 PD Hours
Developing a High Impact Financial Plan	On Demand (eLearning)	1.5 PD Hours
Developing Powerful Business Acumen	On Demand (eLearning)	1.5 PD Hours
Economics for Financial Advisors	On Demand (eLearning)	1 PD Hour
Evaluating a Business Plan	On Demand (eLearning)	3 PD Hours
Finance Fundamentals	On Demand (eLearning)	6.25 PD Hours
Financial Analysis Fundamentals	On Demand (eLearning)	6.5 PD Hours
Financial Statement Analysis Skills (Audio)	On Demand (eLearning)	1 PD Hour

Corporate Finance (cont.)

Course Title	Modality	PD Hours
Financing Strategies	On Demand (eLearning)	7 PD Hours
FP&A Career Pathway: Essential Skills and Knowledge (Audio)	On Demand (eLearning)	1 PD Hour
Going Private: Why Companies Are Exiting Capital Markets (Audio)	On Demand (eLearning)	1 PD Hour
How to Read Business Financial Information	On Demand (eLearning)	3.5 PD Hours
Impact of Tariffs on Businesses	On Demand (eLearning)	2 PD Hours
Introduction to Business Valuation	On Demand (eLearning)	3 PD Hours
Investment Appraisals Not Using Discounted Cash Flows	On Demand (eLearning)	2 PD Hours
Investment Appraisals Using Discounted Cash Flow	On Demand (eLearning)	2 PD Hours
Loan Covenants Explained	On Demand (eLearning)	3 PD Hours
Loan Security	On Demand (eLearning)	2 PD Hours
Math for Corporate Finance	On Demand (eLearning)	2.5 PD Hours
Mergers & Acquisitions: Building Process, Teams & Value (Audio)	On Demand (eLearning)	1 PD Hour

Corporate Finance (cont.)

Course Title	Modality	PD Hours
Mergers and Acquisitions (M&A) Modeling	On Demand (eLearning)	8 PD Hours
Monthly Cash Flow Modelling	On Demand (eLearning)	1 PD Hour
Practical Tips To Get Through A Cash Crisis (Update 2025)	On Demand (eLearning)	2.5 PD Hours
Real Estate Financial Modeling	On Demand (eLearning)	6.5 PD Hours
Risk Metrics & Hedging	On Demand (eLearning)	2 PD Hours
Special Episode: The Implication of Trade Wars on Financial Markets (Audio)	On Demand (eLearning)	1 PD Hour
Succession Planning and Retirement for CPA Leaders (Audio)	On Demand (eLearning)	1 PD Hour
Ten Practical Topics for Financial Leaders	On Demand (eLearning)	4 PD Hours
The New Controllershship: Keys to Boosting Financial Performance	On Demand (eLearning)	2 PD Hours
Understanding Financial Forwards & Futures	On Demand (eLearning)	2 PD Hours
Understanding Portfolio Theory	On Demand (eLearning)	2 PD Hours
Working Capital and Supply Chain Management	On Demand (eLearning)	2.5 PD Hours

Corporate Finance (cont.)

Course Title	Modality	PD Hours
Financing Strategies	Online Seminar	7 PD Hours
Mergers and Acquisitions: From Start to Finish	Online Seminar	7.5 PD Hours
Understanding and Maximizing Bank Financing	Online Seminar	7.5 PD Hours

Personal Finance

Course Title	Modality	PD Hours
Retirement Planning Bundle	On Demand Bundle	6.5 PD Hours
A Six Point Plan for Financial Freedom (Update 2025)	On Demand (eLearning)	4 PD Hours
Cash Cows, Pigs and Jackpots: The Simplest Personal Finance Strategy Ever	On Demand (eLearning)	3 PD Hours
Everything You Need to Know About Government, Bank and Personal Debt	On Demand (eLearning)	4 PD Hours
Financial Myths That Will Ruin Your Retirement Dreams	On Demand (eLearning)	4 PD Hours
Financial Planning: Life Insurance (Audio)	On Demand (eLearning)	1 PD Hour

Personal Finance (cont.)

Course Title	Modality	PD Hours
How to Maximize Your CPP and OAS Pensions	On Demand (eLearning)	2.5 PD Hours
How to Maximize Your Investment Returns	On Demand (eLearning)	4 PD Hours
How to Retire in 10 Years or Less (Update 2025)	On Demand (eLearning)	4 PD Hours
Introduction to Personal Cash Flow Planning	On Demand (eLearning)	1 PD Hour
Mindset-Driven Financial Management for CPAs (Audio)	On Demand (eLearning)	1 PD Hour
What's Next: Ten Success Factors to Best Manage Retirement	Online Seminar	7.5 PD Hours

Wealth Management

Course Title	Modality	PD Hours
Certificate in Wealth Management Advisory	On Demand Certificate	15 PD Hours
Advanced Investing Strategies: Lessons from a Canadian Financial Icon (Audio)	On Demand (eLearning)	1 PD Hour
Alternative Investments for Wealth Advisors	On Demand (eLearning)	2 PD Hours

Wealth Management (cont.)

Course Title	Modality	PD Hours
Fixed Income Fundamentals: Understanding Bonds	On Demand (eLearning)	3.5 PD Hours
Practical Tips for Controllers and CFOs	On Demand (eLearning)	8 PD Hours

