FULL STACK MODELLER

MODELLING THE FUTURE

Your journey into the future of financial modelling starts here

"To anyone considering joining the Full Stack community, I can't recommend it highly enough. Throw yourself at it; not just into the courses, but into the community as well because that's what really differentiates Full Stack from other training courses"

David, England

There has never been a more exciting time to be a financial modeller.

Now, more than ever, the world is focused on trying to better understand what the future might hold.

The goal of modelling has always been the same; to support better decision making.

But modelling technologies are exploding. The tools available to modellers today, and those we can see on the horizon, are truly game-changing.

Those who master these tools will be the ones the business world turns to.

"Learning and innovation go hand in hand. The arrogance of success is to think that what you did yesterday will be sufficient for tomorrow."

William Pollard

the full stack journey

Core Full Stack Instructor Team

Excel Mastery

Excel is your toolbox. Master it.

Giles Male will fill your Excel toolbox. Grasp the foundational Excel skills every modeller needs. The journey starts here.

Advanced Financial Modelling

Design. Build. Review.

Kenny Whitelaw-Jones will teach you real-world model build, advanced visualisation and model review skills.

Financial Modelling Tech Stack

Disruption is here. Embrace it.

Innovation is exploding in the modelling world. Lance Rubin will get you current, and keep you current.

"The reason I joined FSM is because of Kenny, Lance and Giles. I've been following their work for many years and they're amazing in the profession. They're all really accessible and friendly guys."

Areeba, Canada

In Partnership with

We are delighted to be partnering with Maven Analytics to bring you the very best instruction in Power BI and Tableau.

And keySkillset, our other fantastic partner company, bring a gamified approach to keyboard shortcut training that you will love.

Specialist Instructors

Aaron Parry, Maven Analytics

Teaches: Power BI

Aaron has more than a decade of analytics experience. He has been delivering training for more than three years, and heads up Maven's Power BI programme.

Tatiana Ufimtceva, keySkillset

Founder

Tatiana has a background in Banking and Real Estate modelling. She has 15 years' experience delivering financial modelling, business and strategy training, with a focus on modelling efficiency.

Dustin Cabral, Maven Analytics

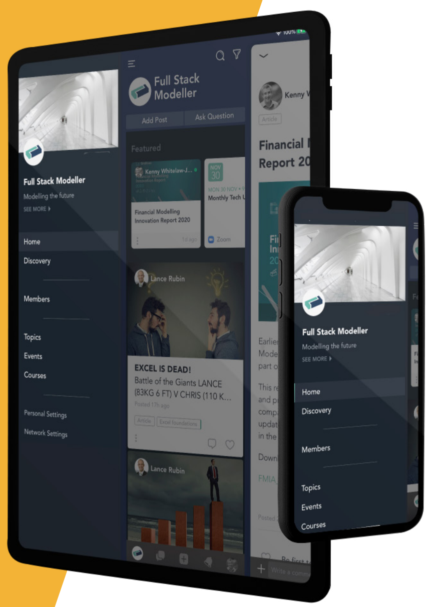
Teaches: Tableau

Dustin is a business intelligence specialist with consulting experience across a wide range of industries. He is a Tableau trainer with a particular focus on data visualisation and strategic analytics.

> "It's more of a tribe than a course"
>
> **Wikus, South Africa**

"Creativity is thinking up new things. Innovation is doing new things."

Theodore Levitt



The Full Stack experience

Online learning.
Live classes.
Case studies.
Modelling tech updates.
Community and support.

All delivered in our purpose-built app.
Available on web, iOS and Android.

Financial modelling is professionalising.

According to the Global Financial Modelling survey 2021, nearly a quarter of financial modellers now hold a professional modelling qualification.

Full Stack founder Lance Rubin is an approved Financial Modelling Institute instructor. As part of your membership you'll receive tuition and live support to prepare you for your FMI exams. We'll be with you every step of the way.

The majority of the Full Stack financial modelling instruction is based on the FAST standard. FAST is one of the most established and most widely used independent financial modelling standard*.

Full Stack Modeller is in the process of becoming CPD accredited. This process will be complete in the first half of 2021. You will therefore be able to count your Full Stack learning time towards CPD points.

*Although our teaching is based on FAST, we also look at other standards to give you the full picture.

Excel Mastery: level 1

Core Modelling Functions
- Learn the most important functions for financial modelling
- Worked examples and exercises to put your skills to the test
- Supporting guides and videos

Shortcut and Navigation Skills
- Learn core navigation and operational keyboard shortcuts
- Innovative gamification of learning with keySkillset
- We aim to make you almost forget your mouse exists

Excel Tables
- Set up and fundamental uses of Excel Tables
- Structured referencing
- Data enrichment
- Maximising the benefits of Excel Tables

Pivot Tables and Charts
- Set up and fundamental uses of Pivot Tables and Charts
- Slicers and Timelines
- Building an interactive report

Power Query
- Understanding the basics
- Managing data from various sources
- Manipulating and enriching your data
- Practical application for finance professionals

Modelling Standards
- The need for standardisation
- ICAEW 20 Principles of Good Spreadsheet Practice
- ICAEW Financial Modelling Code
- SMART Guidelines
- Best Practice Modelling Standard (BPM)
- The FAST Standard

Fundamentals of The FAST Standard
- Why FAST?
- Workbook, Worksheet, Line Item Principles
- The Calculation Block
- Case Studies

Actuals + Forecast Modelling
- The basics
- Using flags
- Dates & drop down lists
- Automation & Power Query

Case Studies - Sarah's Bakery
- Help Sarah from her starting point on the market stall to her first shop with your modelling insights

This first step on the Full Stack journey builds a solid base of foundational Excel skills.

From core function knowledge and confident use of Excel Tables and Pivot Tables, to a truly unique way to develop your shortcut and navigation skill mastery.

We introduce the major modelling standards, setting you up for more advanced modelling exercises to come further on in your journey.

Giles Male is your instructor for Level One. He is a modelling expert with more than a decade of experience, with a particular focus on supporting SMEs and accounting firms with their modelling challenges.

Advanced Financial Modelling: level 2

Introduction
- Keyboard shortcuts for modelling
- Advanced productivity and review tools
- Modelling on a mac

Core Modelling Skills
- What makes models hard to read?
- Understanding model structure
- Core model build skills
- Using placeholders
- How to model balances
- Advanced Financial Modeler (AFM) exam preparation for FMI

Core Model Components and Structure
- Setting up your financial statements
- The 5 types of timing flags
- Revenue and operating costs
- Non current assets and depreciation
- Intro to equity and debt financing, and to tax

Advanced Modelling Topics
- Revolving credit facility
- Debt sizing
- Working capital
- Debt repayment profiles
- Modelling actuals
- Analysing actuals vs budget and forecast

Skills Development Case Studies
- Business expansion
- Refinancing
- Acquisition

Presentation and Data Visualisation
- Designing for effective communication
- Effective table and graph design
- Displaying many variables at once
- Telling stories with numbers
- Practice visualisation case studies

Valuations Modelling
- Introduction to valuations modelling
- The fundamentals of valuations
- What does a good valuations model look like
- The business case, and common challenges faced when valuing a business
- Overcoming common risks and modelling challenges

In Level Two we teach you to be a truly effective and efficient modeller.

We cover the complete process of building and reviewing a model. We also go in depth on the most effective ways to communicate results.

You will receive a free copy of Checkbox, a model review tool built specifically for FAST financial models, and you will also be instructed on the use of alternative model review tools.

Kenny Whitelaw-Jones is your instructor for Level Two. Kenny has taught thousands of modellers over a twenty-year career.

Apply your learning through comprehensive case studies.

Financial Modelling Tech Stack: level 3

Introduction
• The financial modelling technological landscape

Modular Spreadsheet Design
• Three-way models built in minutes
• Disrupting the time and effort on building from scratch
• Modano
• Openbox

Power BI
• Connect and transform raw data sources
• Design and build relational models and dynamic reports, using custom columns and DAX
• Publish, collaborate and share your work with the world
• Delivered in partnership with Maven Analytics

Tableau
• Connect, analyse and visualise raw data with real-world practical case studies
• Tackle advanced techniques such as data relationships, predictive analytics and dynamic design principles
• Learn advanced calculations like RegEx and custom LOD expressions
• Delivered in partnership with Maven Analytics

VBA & Functional Excel
• Learn the core principles from the ground up
• Review basic syntax and generate source code through the macro recorder
• Work through more than 50 real-world use cases, from importing / exporting data to generating automated reports and invoices
• Delivered in partnership with Maven Analytics

Excel Innovation
• Excel continues to innovate. LAMBDA and Dynamic Arrays are two recent additions. We keep you up to date with changes as they happen

Cloud Accounting - Excel Add-ins
• Xero and QBO have changed accounting with cloud integration
• How do we leverage all that the cloud has to offer?
• Don't be left behind in this rapidly evolving and innovative space

Model Review
• Introducing Checkbox - model review software that is free for current FSM students
• Other model review tools
• Analytical vs software model review
• Model Risk Governance

Monte Carlo Simulation
• Run tens of thousands of simulations in minutes
• Keep up to speed with the latest tools on the market for monte carlo simulation
• Live events and specialist guest trainers

In Level Three we focus in on all the great things technology has to offer financial modellers.

Even as we step into new and unknown territory with modular spreadsheet design tools, and visualisation tools like Power BI, our underlying Full Stack principles remain the same; keep things clear and simple.

We explore the best tools on the market, but always with the mindset that we are trying to make our lives, and our stakeholders' lives, simpler and more enlightened.

Lance Rubin is your instructor for Level Three. He is an industry expert in financial modelling technology, and a recent judge in the Financial Modelling Innovation Awards (FMIA).

tuition and enrollment

Full Stack Modeller is an entirely new kind of modelling training.

For what you pay elsewhere for a 2 day classroom course with one instructor you will receive:

- One year of Full Stack Modeller membership
- A personalised training plan based on a detailed analysis of your current skill set
- Access to our purpose-built community app
- All tuition and materials
- Regular modelling challenges and case studies
- FMI exam preparation support
- Regular live events (several per month)
- Regular technology updates including live sessions and guidance from modelling tech providers

One year of Full Stack Modeller membership including all materials and tuition, regular live events including guest instructors and regular tech updates, costs USD 1,950 (plus VAT where applicable).

Membership can be paid in 12 monthly instalments of USD 195, Instalment payments are subject to a 12 month contract.

Discounts are also available for group membership bookings. Early bird and group booking discounts cannot be used together.

Special early bird and group discounts are available. Check offer availability.

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"I had huge expectations, yet it's exceeded every single one of them."

Chris, Australia

Full Stack Manifesto

Full Stack Modellers:

know	that financial modelling is changing. Modellers who don't keep up will be left behind.
embrace	the ever increasing number of new tools and technologies that are transforming the financial modelling space.
understand	that it's not enough to simply know Excel functions and keystrokes. We seek to master these nonetheless.
realise	the importance of using a standard. We mastered our chosen standard and apply it rigorously within our team, increasing productivity and reducing risk.
appreciate	that the model is a means to an end (not the end itself). A model is only useful if it provides insightful answers to important business questions.
value	self-awareness and communication skills as key to our skill set. Our job is to communicate in a way that others understand.
adopt	an open mindset. We embrace change and challenges. We view technology as an enabler.
recognise	the importance of accounting and business knowledge. A model built without it is just a useless spreadsheet.
add	value through analysis, interpretation and communication. The model is the tool we use to do our job. The model is not our job.
present	data in the most effective way possible through a clear understanding of data visualisation principles.
keep up	with the latest tools and technologies. We know what they are and how they work. We know when they are useful and when they are not.

We are the future of financial modelling

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"There is a better way to do it. Find it."

Thomas Edison

fullstackmodeller.com