



Executive Education

Financial Literacy

Finance plays a pivotal role in any strategic decision-making process. From managing cash flow for day-to-day operations to assessing long-term investment opportunities, sound financial decisions have a direct impact on an organization's growth and success.

Making informed decisions requires a detailed understanding of financial statements in order to extract and analyze relevant data and effectively gauge economic indicators and trends, to respond to market dynamics.

Our **Financial Literacy** program is designed to help you build your financial acumen by exploring key factors used in making investment decisions, and delving into financial statements from major industries. In this interactive, blended program, you will not only build a solid foundation of financial terms and concepts, but also develop the confidence to navigate the numbers and speak the language of finance.

Who Will Benefit

You will benefit from this learning experience if you are interested in exploring the following questions:

- How does the market evaluate companies and determine stock prices?
- How can I examine the relationships between items shown on financial statements through ratio analysis?
- How can I use ratio analysis to compare the performance of companies?
- What are the key factors that we need to consider when making investment decisions?

Learning Objectives

Participants who attend this course will learn to:

- Communicate more effectively with executives in their organization
- Build their financial vocabulary to better understand and interpret key financial statements
- Assess the strengths and weaknesses of their competitors more effectively by analyzing their financial statements
- Apply techniques used by market participants to value stocks and bonds
- Understand the decision criteria used when companies make investment decisions
- Develop their own approach to maximize returns through strategic resource allocation

Program Investment

Dates: January 26 - March 1, 2024

Program Delivery: Blended

Commitment: 17 hours

Investment: \$1995



Program Schedule*

Date	Learning Activities	Format	Timing
Jan 22	Program Launch & Learning Platform Orientation	Webinar	Self-directed
Jan 26	Financial Statements - The Language of Business	In-person session	8:30 - 12:00
Feb 2	Financial Statements & Problem-Solving	Online	Self-directed
Feb 9	Basics of Finance	In-person session	8:30 - 12:00
Feb 16	Market Data Analysis through Free Platforms	Online	Self-directed
Feb 23	Financial Decision-Making	In-person session	8:30 - 12:00
Mar 1	Analysis of Financial Statements	In-person session	8:30 - 12:00
Mar 8	Post-Program; Case Studies	Online	Self-directed

Faculty Lead

STEVEN PAGET, CFA

Assistant Professor (Teaching), Haskayne School of Business



Steven teaches finance and corporate governance to undergraduates, graduate students and securities regulators, including courses in Corporate Finance, Securities Analysis and Investment Fundamentals. Prior to joining the Haskayne School of Business, Steven was Director, Energy Research at FirstEnergy Capital, where he wrote investment research on energy infrastructure companies and was a frequent commenter on BNN Bloomberg.

Steven was also a Petroleum Engineer at Cenovus, a Strategic Advisor at Enbridge Inc. and a Corporate Finance Analyst at the Alberta Securities Commission. He helped present the CFA Institute's Investment Fundamentals Program (IFP) to securities regulators and law enforcement officials across Canada.

Grant Funding & Discount Options

This program may qualify for the Canada-Alberta Job Grant when bundled with another program.

If you register for two or more programs at the same time, you also receive a discounted rate from us. Additionally, get a preferred rate when three or more people from your organization enroll.

For more information, contact us at execed@haskayne.ucalgary.ca. An Executive Education team member will be happy to assist you.

Register now

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