



IMA's FP&A Certificate Series

IMA's FP&A Certificate Series enhances your skills in financial planning and analysis as it relates to budgeting, planning, and forecasting. Follow hypothetical case studies and real-life examples as this 3-part series helps you align your company's strategy across the organization and drive its overall performance. The three (3) courses included in the series are:

- 1) IMA's FP&A Series: Strategic Budgeting
- 2) IMA's FP&A Series: Strategic Planning
- 3) IMA's FP&A Series: Forecasting Techniques

This series offers a total of 7.6 NASBA CPE. Earn a Professional Certificate and a digital badge upon successful completion of the series. Competency Domains supported: Strategy, Planning & Performance. This product is available for 1 year after purchase date.

Delivery Method: QAS Self-Study

CPE Credit: 7.6 NASBA CPE

Field of Study: Finance

Knowledge Level: Intermediate

Prerequisite: Work experience in a professional business environment or educational studies in accounting, business, finance, or a related field.

Advance Preparation: None

Release Date: 8/30/2021

NASBA CPE information and Complaint Resolution and Refund Policy:

<https://www.imanet.org/career-resources/nasba-cpe-requirements?ssopc=1>



IMA's FP&A Series: Strategic Budgeting

This is one (1) of IMA's three (3) Financial Planning & Analysis (FP&A) courses. IMA's FP&A Series: Strategic Budgeting enables you to increase your value in your organization by developing strategic budgeting skills and aligning your operating budget with strategic initiatives. Throughout the course, you will work through various lessons that allow you to identify the difference between traditional budgeting and strategic budgeting, apply data analysis and other innovative approaches to budgeting, work within the context of the Balanced Scorecard (BSC) approach, and connect budgeting with planning and forecasting. This course offers 2.2 NASBA CPE. Competency Domains supported: Strategy, Planning & Performance. This product is available for 1 year after purchase date.

Learning Objectives: Upon completion of this course, you should be able to:

1. Describe the three spending categories and how to better control elective activity costs.
2. Recognize the difference between strategic and traditional budgeting approaches.
3. Apply data analysis and other innovative techniques to budgeting initiatives.
4. Identify a firm's key strategic success factors in the context of the Balanced
5. Scorecard, which may be linked to operating budgets.
6. Indicate the various budget measurement tools for planning and control.

Delivery Method: QAS Self-Study

CPE Credit: 2.2 NASBA CPE

Field of Study: Finance

Knowledge Level: Intermediate

Prerequisite: Work experience in a professional business environment or educational studies in accounting, business, finance, or a related field.

Advance Preparation: None

Release Date: 8/30/2021

NASBA CPE information and Complaint Resolution and Refund Policy:

<https://www.imanet.org/career-resources/nasba-cpe-requirements?ssopc=1>



IMA's FP&A Series: Strategic Planning

This is one (1) of IMA's three (3) Financial Planning & Analysis (FP&A) courses. IMA's FP&A Series: Strategic Planning explores the role of the management accountant in the strategic planning process. Throughout the course, you will identify various challenges relating to strategic planning, and review best practices and key steps in successfully completing the strategic plan. Take the lead in your organization by contributing to its strategic plan and drive performance. This course offers 2 NASBA CPE. Competency Domains supported: Strategy, Planning & Performance. This product is available for 1 year after purchase date.

Learning Objectives: Upon completion of this course, you should be able to:

1. Define the key steps and activities included in the strategic planning process.
2. Recognize the contributions that a management accountant can make to various aspects of the planning process.
3. Identify current practices for strategic planning, including data analysis and communication techniques.

Delivery Method: QAS Self-Study

CPE Credit: 2 NASBA CPE

Field of Study: Finance

Knowledge Level: Intermediate

Prerequisite: Work experience in a professional business environment or educational studies in accounting, business, finance, or a related field.

Advance Preparation: None

Release Date: 8/30/2021

NASBA CPE information and Complaint Resolution and Refund Policy:

<https://www.imanet.org/career-resources/nasba-cpe-requirements?ssopc=1>



IMA's FP&A Series: Forecasting Techniques

This is one (1) of IMA's three (3) Financial Planning & Analysis (FP&A) courses. IMA's FP&A Series: Forecasting Techniques will help you develop a forecasting model by focusing on different elements of forecasting. Define the objectives of business-driver-based rolling forecasts, use different methods and analyses in preparing your forecasting model, and review the importance of continuous improvement and a flexible planning process when developing your forecasts. This course offers 3 NASBA CPE. Competency Domains supported: Strategy, Planning & Performance. This product is available for 1 year after purchase date.

Learning Objectives: Upon completion of this course, you should be able to:

1. Define the objectives of business-driver-based rolling forecasts.
2. Demonstrate the use of a variety of forecasting techniques, including regression analysis methods, learning curve analysis, time series analysis, smoothing methods (such as moving averages and exponential smoothing) and Holt-Winters' forecasting method.
3. Identify factors for developing a forecast model.
4. Review the importance of continuous improvement and how it is supported by a flexible planning process grounded in driver-based rolling forecasts.

Delivery Method: QAS Self-Study

CPE Credit: 3.4 NASBA CPE

Field of Study: Finance

Knowledge Level: Intermediate

Prerequisite: Work experience in a professional business environment or educational studies in accounting, business, finance, or a related field.

Advance Preparation: None

Release Date: 8/30/2021

NASBA CPE information and Complaint Resolution and Refund Policy:

<https://www.imanet.org/career-resources/nasba-cpe-requirements?ssopc=1>