

Accelerate the Effectiveness of Your Finance Team

Advanced Education for Accounting Teams



“Insightful and relevant to the finance organization”

S. Chang
Senior Manager, Internal Audit

“Gave me a lot of action topics to take back to my team to consider”

S. Macmillan
Financial Compliance Manager

Designed and Delivered by Accountants

Improve teamwork, communication, and leadership and build a culture of continuous improvement in your accounting and finance team with specialized courses designed and delivered by working professionals. Teams that participate in SVA courses increase trust and effectiveness, leading to more efficient processes and improved performance. Most companies agree that people are the single most important asset. Effective training is crucial if you want to realize the best return from your most important asset.

Finance and accounting teams are facing unprecedented challenges and pressures from both inside and outside organizations. Accounting departments are being called upon to report results more quickly and at the same time the firms are under increased scrutiny from auditors and regulators. And all this is happening in a time of accelerating change. Finance departments today need to operate as efficiently and as effectively as possible, yet they need to be nimble and flexible.

Focus on *People and Process* for Transformational Finance Teams

Most training or education for accounting teams focuses either on use of technology tools ranging from spreadsheets to ERP, or technical accounting issues such as changes to revenue recognition standards. This type of training is important, but it is incomplete. In order to create transformational finance teams, a training program needs to address ***People and Processes*** as well.

People

- How do you improve teamwork and cooperation within your organization?
- Can you unlock the leadership potential of each of your team members?
- Are there techniques to improve communication both within the finance team and between the finance team and other parts of your organization?
- Are your teams aligned with organizational goals?

Processes

- Are your processes agile and adaptable?
- Are your processes well documented and understood?
- Do you have effective change management?
- Can you identify and eliminate bottlenecks?
- Are you continuously improving your processes?
- Are your processes fully compliant?

Financial Effectiveness Framework™

Course Offerings

Optimizing the Accounting Close and Financial Reporting

The accounting close is a crucial financial process that has been resistant to the kinds of process improvement methods that have been used to improve other processes throughout the enterprise. In this course, you will learn about a balanced approach that looks at continuously improving people, processes, and systems and creating a culture of continuous improvement

Transforming People, Processes, & Systems.

This introductory course gives an overview of ways to evaluate areas for improvement and options on how to prioritize. Includes an active workshop session that will identify specific process improvement projects for your organization that can be begun immediately.

Improve Teamwork by Increasing Trust

Develop and leverage high trust teams to improve collaboration within your department and with other departments. Learn about the true effects that differing levels of trust can have throughout your entire organization. Benefit from practical insights that can increase trust levels to create high performance teams.

Mastering Audit Management

Increased pressure from PCAOB as well as changing standards and regulations make audits more complex and more costly. It is up to firms to manage their audits for maximum efficiency. In this class, you will learn techniques for managing the entire audit process from planning and interim to final report.

Our instructors are ***working professionals***.

They bring insight and experience from working with accounting departments and financial teams to improve processes and complete transformation projects



“An effective presentation to help support an optimal close process.”

T. Mufti

Sr. Manager Audit Risk and Controls

“Very interesting and thought provoking.”

L. George

Senior Manager Accounting

Customized On-Site Courses



Find out more Education@SVACPA.com

Leadership and Teamwork

Course Offerings

Creating, Maintaining, and Enhancing Effective Teams

How can you transform your teams so that they are agile, responsive, and focused on collaboration and continuous improvement? Learn techniques that have worked for other teams and develop a success plan for your team to implement right away.

Leadership Skills for Finance Teams

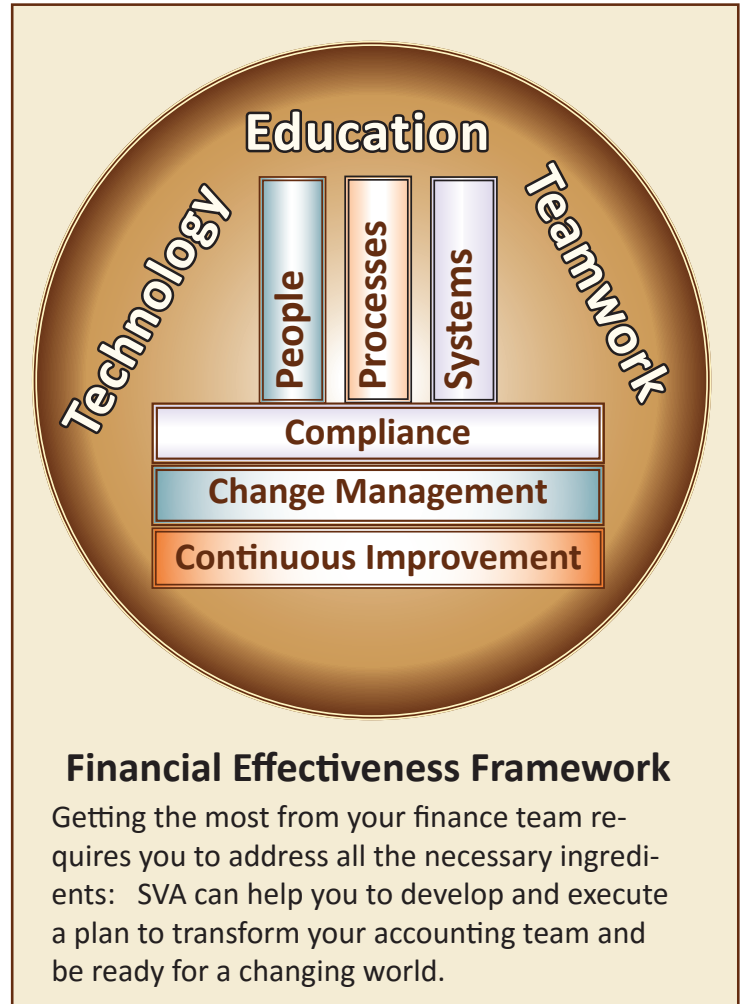
What if every member of your team was a leader? What if every member of the team contributed to the goals and accountability that define successful teams? What are the traits of a successful leader? The course explores ways to set goals and inspire trust, and develop effective leadership skills.

The Art of Effective Communication – for Accountants

Learn how to overcome challenges that inhibit effective communication. Communication is required at every step of the reporting process, whether it is gathering inputs, designing and performing analyses, or presenting results to management, accountants need to communicate up, down, and across the organization. Yet few accountants get explicit training in communication skills. This course will teach teams to improve communications in all directions

Practical Project Management for Accountants

A significant amount of an accountant's time is spent in project management tasks. Whether it is defining a new procedure, implementing a software upgrade, compiling a budget, or producing a set of financial reports, accountants need to work across departments, define deliverables, and manage deadlines. This course will focus on practical techniques for setting goals, improving communication and managing timelines



Financial Effectiveness Framework

Getting the most from your finance team requires you to address all the necessary ingredients: SVA can help you to develop and execute a plan to transform your accounting team and be ready for a changing world.



Right Topics - Right Venue

From teamwork and process improvement to revenue recognition and PCAOB updates, SVA offers the training and information your team needs in the time and place that makes the most sense. Choose from live, online or onsite classes.

For more information visit www.SVACPA.com/EDU

Customized On Site Courses

Onsite courses can be a cost effective and efficient way to provide needed training to your entire team at once. When all the members of your team have participated in the same training a common culture and language will develop. Onsite training eliminates travel costs, and builds teamwork.

Find out more about onsite courses by contacting us at Education@SVACPA.Com

Benefits of SVA Training and Education

- Improved Collaboration
- Empowered Leaders
- Increased Agility and Responsiveness
- Strengthened Time Management
- A Culture of Continuous Improvement



SVA courses are designed and delivered by working professionals who actively help companies to improve financial processes

SVA Founder and CEO Gabe Zubizarreta



Gabe Zubizarreta is a CPA with over 20 years of experience ranging from Senior Audit Manager at PriceWaterhouseCoopers and Assistant Controller at a public company to Director of Finance at Buckaroo, Inc., a Silicon Valley start-up and founder of his own CPA firm where the services are always guaranteed. He spent over 8 years in PWC's Audit and Advisory services managing SEC registrant audits, advising on M&A transactions and helping clients achieve Sarbanes-Oxley compliance. Since founding Silicon Valley Accountants in 2008, Gabe primarily focuses on financial effectiveness; however, also advises clients on financial reporting matters, assisting with mergers and integrations, as well as Sarbanes-Oxley compliance processes.

Gabe is a recognized expert in financial effectiveness and financial close optimization and has spoken at Financial Executives International (FEI), Institute of Management Accountants (IMA), Ohio State Society of CPA's (OSCPA) and many other organizations.

Gabe also teaches professional education courses on topics including; Mastering Audit Management, FASB updates, Revenue Recognition, Business Combinations, Software Revenue Recognition, Credit Crisis and Optimizing the Accounting Close and Financial Reporting.

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