

Small Business Financial Statements and Tax Returns

A One-Day Workshop to Review the Basic Principles of Small Business Financial Statements

Join your industry peers and enhance your professional development

Small Business Financial Statements and Tax Returns reviews the basic principles of small business financial statements and teaches you how to calculate and interpret basic financial ratios and measures to evaluate the performance of a business. Paper-based self-study materials are provided along with an online assessment.

Attend our one-day workshop and gain the skills needed to:

- Explain the differences between cash and accrual accounting.
- Identify the information provided on a balance sheet and income statement and the order in which that information is presented.
- Recognise links between the balance sheet and income statement and identify accounts on both statements that would be affected by common business transactions.
- Analyse trends in common-size financial statements.
- Calculate and interpret basic financial ratios and measures to evaluate the performance of a business.
- Identify the basic sources and uses of cash in a business.
- Recognise common differences between income and expenses reported on tax returns and those reported on financial statements prepared for external users.

Topics to be covered:

- *Financial Statement Fundamentals* reviews the basic principles of business financial statements.
- *Financial Statement Analysis* provides you with questions to ask when you receive a company's financial statements, as well as basic financial ratios to help evaluate a company's performance. The concept of cash flow is reviewed and a summary of major account types and issues to probe is provided.
- *Business Tax Returns* provides a view of the financial statements from a tax perspective, introducing the key differences between financial accounting and tax accounting and describing the tax forms seen when working with small business customers.

This workshop is for:

Lenders for SME and Middle Market sector, Relationship Managers, Business Development Managers and Asset and Equipment Finance organisations.

Location and Date:

Sydney:
24 March 2009
OR
22 September 2009

Melbourne:
25 March 2009
OR
23 September 2009

Auckland:
31 March 2009
OR
15 September 2009

Omega
Performance
improves business
by empowering
people with the
knowledge, skills
and behaviour
to achieve
outstanding
results.

Small Business Financial Statements and Tax Returns

9:00 AM – 4:00 PM

Fee: \$690 plus GST per participant

Omega
PERFORMANCE

About our facilitators:

- **Jim Cassidy**, Omega Performance Consultant for Asia/Pacific, is a key facilitator of Omega's credit programs throughout Australia. Prior to joining Omega, Jim worked in the credit training area where he and his team trained over 1,800 business banking employees. Jim has over 15 years of experience in frontline lending positions, both in retail and commercial lending.
- **Ian Counsell**, Omega Performance Consultant for Asia/Pacific, joined the Omega team with many years experience in the financial services industry. Ian gained this experience from working not only with one of the Big 4 accounting firms, but also with credit unions and a leading building society. With some 15 years in sales and service management roles added to over 10 years credit and strategic management responsibilities, Ian brings a wealth of knowledge and experience to Omega. He has deep industry knowledge and experience in lending—from origination through to credit control—specialising in the consumer and business sectors, as well as commercial and agri business.

VENUE

- Sydney, Australia**
Tuesday 24 March 2009 or
Tuesday 22 September 2009
- Melbourne, Australia**
Wednesday 25 March 2009 or
Wednesday 23 September 2009
- Auckland, New Zealand**
Tuesday 31 March 2009 or
Tuesday 15 September 2009

REGISTER NOW

To reserve your place in the workshop either:



Georgina Terizis
+61 2 9236 8400



Web: <http://www.omega-performance.com/rsvp/Australia-SmallBusiness09.asp>

Email: AP.info@omega-performance.com

Omega Performance *Improving Business*

Omega Performance improves business by empowering people with the knowledge, skills and behaviour to achieve outstanding results.

Since our founding in 1976, Omega Performance has enabled more than 2 million people in over 2,500 financial services organisations around the globe to make immediate and lasting changes in how they perform.

Omega Performance's consulting, performance improvement, and coaching solutions span leadership, commercial and consumer lending, commercial and consumer sales, sales management, customer service, wealth management and private banking and contact centres.

We pair our deep financial services industry expertise with a keen understanding of your organisation's particular performance issues to ensure a results-focused solution. With a network of over 250 consultants, facilitators, instructional design experts and developers around the world, Omega is able to provide in-depth local expertise supported by an extensive global network.

Omega's continuous research into the future of the financial services industry has helped shape innovative performance improvement strategies within many of the world's major financial services companies. While our culture of thought leadership encourages us to explore new concepts and solutions, our strategic focus never varies: delivering competitive advantage for your organisation's business success.

Headquartered in Charlotte, North Carolina, USA, Omega Performance also serves clients from major offices in over a dozen countries around the world.

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www.omega-performance.com

Cancellation Policy: Should you be unable to attend, a substitute delegate is always welcome at no extra charge. Alternatively, a full refund will be made for cancellations received in writing (letter, fax, email) up to two weeks prior to the event. Regrettably, no refunds can be made less than 15 days before the event. For any event cancelled by Omega Performance, registration fees are fully refundable.

Privacy policy: The personal information shown on this brochure provided by you will be held on a database.

Team Discounts: For three or more participants please call +61 2 9236 8400 for details.

Program: Omega Performance reserves the right to alter the venue &/or speakers.