Finance, Accounting & Tax

# Utilising Financial Statements for Strategic Decision Making

## Course Details

**Price**

£225.00

**Start date**

13 March 2026

**Length**

Half day (09:00-13:00)

**CPD Points**

4.00

## Course Overview

This session is designed for high-performing professionals, managers, directors and specialists who want to sharpen their financial literacy in order to drive decisions, shape strategy and tell the story of performance.

Whether reviewing board packs, managing budgets or simply wanting to ask better questions in meetings, these sessions will give delegates the clarity and confidence to engage with financial information.

The course will focus on core financial accounting and specifically financial statements; what they are, why they matter and how to interpret them with confidence.

Delegates will gain the skills to read and understand financial statements with clarity, decode financial language and key concepts and apply this knowledge to their role with confidence and commercial awareness.

## Course Content

### What are Financial Statements and why do they matter?

- Purpose and uses of financial statements
- What they aim to achieve in a business context

### Primary Statements and the notes

- Detailed look at the components of the balance sheet (Statement of Financial Position), P&L (Income statement) and Statement of Changes in Equity (SoCE).
- Overview of the Cashflow Statement.
- Why the notes are so important and how to ensure they are correct

### Financial Accounting verse Management Accounting

### GAAP (Generally Accepted Accounting Principles): Why they matter and how they shape financial reporting

### Legal requirements and other key areas

- What companies must disclose and why?
- Audit opinions, and exemptions
- Solvency and going concern

### Key Accounting Concepts for Non-Finance Roles

- Capital & Revenue Expenditure
- Accrual Concept (Accrual / Creditors / Payable / Debtors / Receivable / Prepayments / Deferred income)
- Fixed Assets and Investments (Depreciation and Fair Value)
- Loans and other Intercompany agreements (impairment, interest and other considerations)
- Key concepts: Materiality, prudence and consistency
- Other areas to watch: Provision, Related Parties and PBSEs

### Ratios to leverage when analysing financial statements

- Loan to Value
- Quick Ratio
- Profitability
- Liquidity and Solvency indicators

**Practical, hands on and commercial review techniques**

- What to look for and how to ask the right questions

# Benefits

This course is designed to empower high-performing managers, directors, and specialists with the financial insight they need to lead confidently.

After this session, delegates will have:

- Greater financial awareness and more understanding of the language of finance, how it connects to your operational decisions and how to leverage financial information to uncover performance, risk, and opportunity
- Skills to approach conversations with new knowledge, allowing you them to ask questions and challenge assumptions with clarity and confidence.
- The ability to bridge the gap between commercial thinking and financial reporting and with practical skills to support real-world decision making
- The skills to read, understand and leverage financial information included in management and board packs with confidence
- The confidence to contribute meaningfully to strategic discussions and financial planning

# Next Steps

If you would like to book a place on this course please click on the **'Book Course'** button to the right of this page and login or register for a user account to complete your booking(s). Any queries please do not hesitate to contact us via **admin@gta.gg** or call us on 01481 224570.

If no date is scheduled for this course at the present time please click on the **'Register Interest'** button and login or register for a user account so that we can add you to our course interest register. This register allows us to contact our tutors and finalise dates for a course as soon as we have a few people who have expressed their interest, so the more delegates who register their interest, the sooner we can schedule a particular course.

# Course Tutor

## Victoria Le Poidevin

Vicky Le Poidevin FCA, Dip IoD regularly provides interactive and engaging training sessions to a wide range of financial services and commercial delegates. Vicky continually adapts her training style to suit the variety of delegates that attend her courses, and she actively enjoys running training for all levels of experience including parties at the beginning of their career, directors looking to continually enhance their skills and all parties in between looking to upskill or get ahead in their career. Vicky's training is under pinned by practical, real-life examples that leverage her 20 plus years' experience in the financial services sector. Vicky believes that delegates learn by doing, so she tries to include practical exercises into her courses to ensure the learning experience remains interesting, relevant, and engaging. As well as running numerous training courses, Vicky is a management consultant and has worked with numerous businesses on multiple projects, giving her a unique knowledge and experience to enrich her training. Vicky's generalist financial services experience also includes 10 plus years of auditing and accounting with a big four firm /regional firm and holding senior roles in both the Fund and Trust sector.