

# FACT SHEET

Professional Development Session

## Small Business Lending Techniques



The National Finance Institute



This professional development session must be combined with others to create a customised half-day session.

### **What does the course cover?**

Do you find the task of analysing your self-employed client's financials a daunting task? If you answered "YES" then this session is specifically for you.

This 3 hour session will explain the basics of understanding profit & loss statements and balance sheets as they apply to the small business sector. You will feel more comfortable targeting self-employed prospects and open-up the small business market as a possible new opportunity.

- How to analyse the elements of financial statements
- Identify the information required to submit a business loan
- Discover the art of identifying relationships between various components of financial statements
- Develop the skills necessary to start writing business loans.

### **Are there any CPD points available for this session?**

This session has been designed to contribute toward the Mortgage Industry Association of Australia's (MIAA) continuing professional development (CPD) requirements. The CPD points allocated, for each session may vary according to the level of technical knowledge involved. As an indication, mortgage industry related educational workshops are allocated 3 points per day or 1.5 points per session. However, these courses shouldn't be considered a 'point accumulation exercise', but rather a means to create a competitive edge over your rivals.

### **What happens if I attend, but don't gain any benefit?**

If you attend an NFI professional development course and for any reason it does not prove to be an experience that can help you establish, or greatly improve, your career as a mortgage professional, you will receive a 100% refund upon request at the completion of the course. We make this guarantee because we believe 100% in the results our courses deliver.

### **Who has this session been developed for?**

This session has been developed for owners and managers of mortgage broking firms. It is also particularly relevant to managers and support staff of aggregation, franchise and other large mortgage companies.

### **How long will this course take to complete?**

This session is three hours duration. It is to be combined with other available sessions to make a half-day training course.

### **When are the courses scheduled?**

Courses can be conducted to suit your schedule. We can arrange a venue or it can be held at your training room. We require 20 participants to conduct a course.

### **What materials/equipment do I need?**

A workbook is supplied at the commencement of the course. You only need to bring a pen.

### **How much does a professional development course cost?**

Prices range from \$115 to \$225 per person.

### **What will I receive?**

You will receive a course workbook and Certificate of Attendance.

### **When does the course start and finish each day?**

Courses generally start at either 9am or 1pm, depending on the time constraints of the group.

### **What should I wear to the training and what is the arrangement for lunch?**

Smart casual is expected as a minimum dress standard by all students. You are responsible for organising your own lunch unless notified otherwise.

### **How do I arrange a course?**

Please call Client Services on 1300 765 400 – we'd be delighted to hear from you.

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1300 765 400

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07 3822 6003

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