



# How to Identify, Explain, and Present Pertinent Financial Information to Non-Accountants

- ***Presenting Financial Information in Understandable Patterns***
- ***Identifying and Explaining the Key Financial Metrics Non-Accountants Must Understand***
- ***Positioning the CPA as a Communicator of Solutions***

High-Impact interactive program, loaded with practical ideas and techniques to help non-accounting associates and clients understand the numbers.

Financial information is one of the most critical management tools to evaluate business success and profitability. Yet far too many non-accountants are unable to read financial statements and use this information to enhance profitability.

Most business decisions are intended to enhance performance and improve the “bottom line.” An understanding of accounting and finance is essential for decision making and managing businesses more profitably.

This subject is especially beneficial with today’s emphasis upon Teambuilding, and Employee Involvement, where responsibility, authority, and decision-making are shifting to lower organization levels.

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## Seminar's Primary Focus:

- Developing Understandable Internal and External Financial Statements — determining the purpose, selecting the proper metrics, simplifying the report format.
- The Three-Step Process for Gaining Insight:
  1. Identifying the key financial metrics - Key Results Indicators (KRIs)
  2. Determining the "drivers" that impact the metrics - Key Performance Indicators (KPIs)
  3. Presenting the metrics and drivers in understandable patterns
- Identifying Needs and Opportunities — how financial understanding will enhance decision-making at every level for both Strategic and Operational objectives.
- How to Determine and Explain Key Results Indicators — numbers that determine an organization's level of success, not just measure it.
- The Six-Step Process for High-Impact Presentations — Knowing the audience, holding the listeners, feeling comfortable as a speaker, and adding visual impact.
- Positioning the CPA as a Financial Leader and "superb communicator of solutions" within the organization and with your clients.

## What Will Be Learned:

- How to help non-accountants understand and interpret financial statements and accounting reports.
- How to identify the numbers that determine an organization's level of success, not just measure it.
- How to organize and present financial information to adult learners.
- How to make High-Impact Presentations.
- How to explain ten meaningful financial ratios to unlock the hidden meaning inside financial data.
- How to feel more confident and comfortable explaining financial information.

## Who Should Attend:

CPAs who want to enhance their skills and abilities to explain financial information to non-accountants, and feel more comfortable making presentations.

## Seminar Materials:

Each participant will receive a large workbook, which will be used during the seminar and serve as a valuable take-home reference. The workbook includes many forms, schedules, and checklists (both financial and non-financial) that can be used immediately in business.

## Seminar Length:

One day - lecture, highly-interactive, small group discussions, exercises and case studies, opportunities for participants' questions.

**CPE Credit:** 8 hours.

**Level of Knowledge:** Basic.

**Prerequisite:** None.

**Advance Preparation:** None. Participants requested to bring a pocket calculator.

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## About Your Seminar Developer / Presenter:

Jack Park is a highly effective developer and presenter of financial seminars. He has developed several "Accounting and Finance for the Non-Accountant" seminars, which he presents each year to organizations and associations nationally. Park was directly involved in designing, implementing, and administering Cost Reporting Systems (as Vice President of Finance, Controller and Manager of Cost Accounting) with various operating Divisions of the Greyhound/Dial Corporation and the Westinghouse Electric Corporation.

Park holds the National Speakers Association's Certified Speaking Professional (CSP) designation. The CSP, established in 1980, is the speaking industry's international measure of professional platform skill. Fewer than 7 percent of NSA's 3,000 members hold this professional designation. He is a recipient of the Ohio Chapter's Member of the Year Award. Park has presented programs nationwide for 44 different State CPA Societies, Associations, Institutes and numerous Corporations. His knowledge and presentation skills ratings are consistently among the highest of all instructors.

In 1989, Park founded Financial Insights, a consulting and seminar development firm, after spending 22 years with four major corporations. Financial Insights assists organizations with their business planning, and with improving their financial profitability and reporting.

## Seminar Outline

### Helping Non-Accountants Understand Financial Statements

- Creating Financial Statement "Skeletons" for Understanding
- Income Statement (How We're Doing)
- Balance Sheet (Where We Are Now)
- Statement of Cash Flows (Where From, Where to)
- Performance Ratios
- Supplemental Accounting Reports

### Gaining Insight

- Identifying Key Financial Metrics
- Determining the "Drivers"
- Presenting in Understandable Patterns
- Creating Customized Internal Reports
- The CPA as Trainer, Facilitator, Educator

### Making High-Impact Presentations, a Six-Step Process

- Knowing the Audience
- Grabbing and Holding Listeners
- The Power of Body Language
- Adding Visual Impact

**Financial Insights – Jack Park**  
2439 Andover Rd Columbus, OH 43221  
614-481-0214 [jp31@jackpark.com](mailto:jp31@jackpark.com)  
[jackpark.com](http://jackpark.com)