



Training Course

Finance Manager Secretary

Description

The role of a Finance Manager Secretary extends beyond traditional administrative tasks. It requires a strong understanding of financial principles, excellent organizational skills, and the ability to manage sensitive financial data with precision. This course is designed to empower secretaries working in finance environments with the knowledge and skills necessary to support finance managers effectively. Participants will gain expertise in financial documentation, reporting, budgeting, and compliance, ensuring they become indispensable assets to their organizations.

Objectives

By the end of this course, participants will be able to:

- Understand basic financial and accounting principles relevant to the role.
- Manage financial documents, including invoices, receipts, and financial statements.
- Support finance managers in budgeting, forecasting, and expense tracking.
- Ensure accuracy and confidentiality in handling financial data.
- Communicate effectively using financial terminology with internal and external stakeholders.
- Assist in preparing reports for audits and compliance purposes.

Who Should Attend?

This course is ideal for:

- Secretaries and executive assistants working directly with finance managers.
- Administrative professionals in finance or accounting departments.
- Office staff responsible for managing financial documents and supporting finance-related tasks.
- Professionals seeking to enhance their career prospects in finance administration.

Course Outline

Day 1: Financial Fundamentals for Secretaries

- Introduction to financial management and accounting principles
- Understanding financial terminology and documentation
- The role of a finance manager secretary in supporting financial operations
- Practical Exercise: Identifying key financial documents

Day 2: Managing Financial Documents and Records

- Handling invoices, receipts, and expense reports
- Organizing and maintaining accurate financial records
- Ensuring data confidentiality and compliance with financial policies
- Workshop: Setting up an efficient financial filing system

Day 3: Budgeting and Expense Tracking Support

- Assisting in budget preparation and monitoring
- Techniques for tracking expenses and managing office budgets
- Identifying discrepancies and ensuring accurate financial reporting
- Activity: Preparing a simple budget report for management

Day 4: Financial Reporting and Communication

- Preparing financial reports and presentations for finance managers
- Communicating effectively using financial language
- Supporting audit preparation and financial compliance
- Practical Session: Drafting a financial summary report

Day 5: Advanced Financial Administration Skills

- Time management and prioritizing financial tasks
- Using financial software and tools (e.g., Excel, accounting systems)
- Problem-solving and decision-making in financial administration
- Final Workshop: Managing a simulated finance project from documentation to reporting