



Budgeting & Forecasting For Small Business

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A PERSONAL NOTE OF WELCOME FROM EVELYN JACKS, PRESIDENT, KNOWLEDGE BUREAU

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Budgeting and Forecasting for Small Business

OVERVIEW
This course is ideal for bookkeeping, accounting, tax, and financial service professionals who wish to obtain the necessary skills to assist or direct the budgeting and forecasting process, helping clients to grow their small business or prepare for external parties, such as financial or strategic partners. It is also an ideal course for professionals who wish to formalize training in this area to grow their own practice.
APPROACH
It is one thing to properly maintain a company's books by way of accounting software, but quite another to use this financial information to assist a company in meeting its financial goals and making better management decisions throughout the year. This course is designed to provide guidance as to how information within accounting systems can be used to develop the important budgeting and forecasting requirements of every small business, keeping the needs of Management and external parties in mind.
WHY IS THIS CONTENT ESPECIALLY TIMELY AND/OR IMPORTANT
The global pandemic has resulted in many business leaders having to rethink their approach to managing operations, as well as paying increased attention to financial performance, profitability, and cash flow to meet obligations on both a personal and business level. They also need to have a keen understanding of the necessary financial information to apply for various government supports and lending programs. Finally, this course provides insight into the type of financial considerations of financial partners, as companies consider financing, strategic partnerships, and sale of business.
WHAT YOU WILL LEARN?
<ul style="list-style-type: none"> • The Basis of Financial Decision-Making. The differences between internal management accounting and financial accounting, as well as the use of information within accounting systems to assist business leaders and their advisors to make business decisions. • Financial statements, budgeting, and forecasting: Budgeting components, assumptions account analysis and analyzing transactions, as well as the implications for each financial statement component (operating/income statement, balance sheet, cash flow statement). • Reporting and external parties: Implications pertaining to Management reporting needs and those of external parties, such as investors, financial, and strategic partners.
SCOPE OF THE CONTENT:
<ol style="list-style-type: none"> 1. The Basis of Financial Decision Making & Role of Management Accounting 2. Basic Account Analysis: Balance Sheet and Income Statement 3. Introduction to Accounting for Costs: Role in Budgeting and Forecasting 4. Budgeting Basics: The Year Ahead 5. The Balance Sheet: Accounting for Fixed Assets and Liabilities in Forecasting and Decision-Making 6. The Sales/Production Budget 7. Other Budget Items 8. Cash Flow Budgeting 9. Decision-making: Analyzing Actual Results this Year, Comparisons to Last Year, Budget Forecasts, and External Party Considerations

CHAPTER 1

THE ROLE OF THE MANAGEMENT ACCOUNTANT

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- You will be able to distinguish between the roles and responsibilities of the financial accountant and the management accountant and will understand how the responsibilities vary if the accounting is performed by an internal accountant (either an employee or contractor), or by an external accountant.
- You will understand the various levels of association a professional external accountant may have with an organization's financial information and the varying degrees of reliance a user of such information may place on that association.
- You will be able to identify how the management accountant assesses the information needs of the users of financial information, and the more commonly encountered types of information the management accountant would prepare for each of the major transaction cycles a business engages in.

NEW SKILLS TO BE MASTERED:

- An understanding of the various roles played by bookkeeping and accounting professionals in the preparation of financial information for a business enterprise.
- An understanding of the various types of financial information and reports typically prepared for an enterprise, the various stakeholders who have an interest in that information, and the various uses to which the information is put.

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What is management accounting?
- What types of financial information are typically required for management to monitor and manage a business?
- How is management accounting distinguished from financial accounting?
- What are the various roles of the bookkeeping and accounting professionals who may be involved in the preparation of financial information for a business enterprise?
- What are the various levels of association external accountants generally have with financial information and how does the degree of reliance that one may put on that information vary?

CHAPTER 2

BASIC ACCOUNT ANALYSIS

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- You will be introduced to the various formats that are used in analyzing an account.
- You will be able to identify where the various formats are best used and will be able to prepare a basic account analysis for balance sheet, revenue and expense accounts.
- You will understand the issues that are most commonly of interest in the various types of account analysis, including the comparison of actual results to budget and assigning budget responsibility, and will be introduced to the types of accounts that management accountants are most commonly called upon to analyze.
- You will be able to present an account analysis in formats suitable for both business owners and external accountants.
- You will understand the processes normally involved in interim period remediation of the sources of budget variances.

NEW SKILLS TO BE MASTERED:

- The ability to analyze both balance sheet and income statement accounts, using the format appropriate to the type of analysis, so as to provide useful management information for the owners and managers of a business.
- An understanding of the issues that are normally of interest to owners and managers when reviewing balance sheet, revenue and expense accounts and the ability to identify accounts which are likely to be of interest to the owners and managers.
- An understanding of how an account analysis provided to external accountants might differ from those provided to other stakeholders.
- A general understanding of the processes involved in adjusting operations to take into account interim variances from budget.

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What elements in the business environment should management be concerned with in developing, implementing and monitoring a business plan?
- How can management use the Balanced Scorecard as a tool in evaluating its vision and strategies for achieving that vision?
- What are the three basic types of account analysis, and where would each most commonly be used?
- What distinguishes the analysis of a balance sheet account from the analysis of an income statement account?
- What types of account do most businesses analyze periodically?
- How does a bookkeeper determine who in the organization should receive the account analysis and other financial reports?

CHAPTER 3

INTRODUCTION TO COST ACCOUNTING

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- You will understand the various ways in which costs can be identified, including direct costs, indirect costs, full costs, variable costs, fixed costs, marginal costs, standard costs, actual costs and sunk costs.
- You will have a basic understanding of which concept of cost may be most useful in preparing budgets and in making business decisions.
- You will understand the various techniques for allocating indirect costs to production or inventory and will understand the benefits and limitations of each.
- You will understand the impact of the cost accounting methods chosen on the organization of the chart of accounts, and the need for systems to capture accounting information from daily operations.

In the on-line accounting software supplement accompanying this chapter, you will learn that accounting software can be used to create a job to which you can allocate revenues and expenses.

NEW SKILLS TO BE MASTERED:

- The ability to identify the various ways in which costs can be identified and classified, the nature and use of each.
- The ability to assess which measure of cost is most appropriate in addressing the various decisions a business makes.
- An understanding of the limitations inherent to each measure of cost that a business may use.
- The ability to use accounting software as a tool in measuring, allocating, recording and reporting cost information that is useful in business decision making.

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What are the various ways in which cost is measured?
- What information does each way of measuring cost provide?
- Where would each measure of cost be most appropriately used?
- What are the various limitations that come with each measure of cost?
- How does accounting software assist in the accumulation of revenue and cost information related to a particular project or job?

CHAPTER 4

BUDGETING BASICS

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- You will be introduced to the concept of budgeting.
- You will understand the importance of familiarity with a business's processes in the preparation of the budget, and the roles the various stakeholders – bookkeepers, accountants, management and owners – play in the preparation of the budget.
- You will understand the elements of the political, economic, social and technological environments that affect budgeting, and will understand how to identify those elements that are to be considered in any particular circumstance.
- You will be presented with the various types of assumptions that businesses typically need to make before a budget can be prepared, and how each assumption affects the various components of the budget.
- You will be presented with a typical format in which a budget might be prepared and how it rolls up into the budget report presented to the stakeholders.

In the on-line accounting software supplements accompanying this chapter, you will learn how to enter budget information into the accounting software and how to update budget amounts. You will learn how to extract information from the program and enter into an Excel spreadsheet to be used in the preparation of the budget in that program.

NEW SKILLS TO BE MASTERED:

- The ability to identify the key elements of the budgeting process and the roles the various participants play.
- The ability to recognize the inter-relationship between budget accounts and the effect on these accounts of the various assumptions made about the political, economic, social and technological environments in which the business functions.
- How to format a typical budget for a commercial enterprise.

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What is a budget?
- What does it say about a business if it views its budget as primarily a financial forecast?
- What does it say about a business if it views its budget primarily as a planning tool?
- What are the various roles of the participants in the budgeting process?
- Why is an understanding of the environmental factors affecting a business important to budgeting?
- What is the best way to format a budget?

CHAPTER 5

FIXED ASSETS AND CAPITAL BUDGETING

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- You will learn how to prepare a fixed asset account analysis and will understand the issues unique to accounting for fixed assets.
- You will be able to identify the unique attributes of fixed assets and what information relating to such assets that must be accessible so long as the assets are owned.
- You will understand how to prepare an analysis of fixed asset additions, disposals and depreciation, and how to record all three types of transactions.
- You will understand how to account for sales taxes on both the acquisition and disposition of fixed assets.
- You will understand how a capital budget impacts both the operating and cash flow budget.

In the accounting software exercises you will learn to set up a standard monthly journal entry to record depreciation.

NEW SKILLS TO BE MASTERED:

- The ability to prepare a running analysis of fixed assets reporting cost, accumulated depreciation and net book value.
- The ability to record additions to, disposals of, and transfers of fixed assets.
- The ability to record the sales tax implications of fixed asset transactions and to record sales tax attributes of continuing interest.
- The ability to prepare basic analysis of capital investment alternatives open to a business.

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What aspects of fixed asset accounting create unique accounting issues?
- How does a bookkeeper record transactions relating to fixed assets?
- What information about individual fixed assets does a business need to keep track of?
- What is a capital budget?
- How does a capital budget tie in to the operating and cash flow budgets?
- How does a business determine how to allocate its capital spending?

CHAPTER 6

THE SALES/PRODUCTION BUDGET

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- You will be introduced to the various approaches to sales budgeting – zero-base budgeting and historical budgeting – and will understand where each might be appropriate.
- You will understand how the sales budget impacts all other areas of budgeting, including the direct correlation with production, marketing, inventory management and cash flow requirements.
- You will be introduced to the concepts of lead times, accounts receivable turnover, accounts payable management and inventory turnover and will be able to apply these concepts in preparing a budget.
- You will understand how an enterprise can use benchmarking as a tool in assisting in the preparation of the budget and monitoring performance against the budget.

In the accounting software exercises you will learn how the software can be used to extract historical sales information to be used in preparing the current year's budgets.

NEW SKILLS TO BE MASTERED:

- The ability to identify approaches to be used in preparing a sales budget and the circumstances in which each might be employed.
- The ability to identify the relationship between the sales budget and other budgetary areas and to use these relationships in ensuring that the budget is prepared consistently.
- The ability to identify commonly used financial ratios and to employ them in assessing the plausibility of budgets.
- The ability to identify when third-party information can be used to assist in evaluating performance against budget.

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What are the various ways in which a sales budget might be prepared?
- When would each best be suited to the business?
- How does the bookkeeper identify relationships between the sales budget and production and other functional areas in the business?
- What ratios are more commonly used in monitoring economic performance?
- How might third-party information be similarly used?

CHAPTER 7

OTHER BUDGET ITEMS

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- You will be introduced to the issues commonly encountered in preparing budgets for overhead expenses, miscellaneous revenue, investment income, capital contributions, debt and income taxes.
- You will understand how budgeted balance sheet accounts flow out of the operating budget and how the operating budget ties in to the cash flow budget.
- You will be able to apply these concepts in preparing a budget.
- You will be introduced to the concept of compensation planning in the privately owned business and its impact on cash flow budgets.

There are accounting software exercises associated with this chapter.

NEW SKILLS TO BE MASTERED:

- The ability to identify the most suitable approach to budgeting miscellaneous expenses.
- An understanding of how balance sheet accounts flow out of the budgeting process.
- An understanding of the basic principles involved in budgeting for the compensation of the owners/managers of a Canadian corporation, including the income tax and cash flow effects.

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What budgeting techniques are best applied to the various overhead accounts a business typically records?
- How does a business budget for its balance sheet accounts?
- How do corporate compensation policies affect an incorporated business's income tax liability and cash flows?

CHAPTER 8

CASH FLOW BUDGETING

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- You will understand the difference between budgeting for operations and budgeting for cash flow.
- You will be able to identify the adjustments typically required to an operational budget to produce a cash flow budget.
- You will understand the techniques commonly employed in managing accounts receivable and accounts payable in managing cash flow.
- You will understand the various ways in which cash flows can be analyzed and will be able to prepare cash flow budgets in these various formats identifying which might be the most appropriate to a user of the financial information.

In the Accounting exercises you will learn how to use the accounting software to record and monitor credit policies for customers as part of the process of managing cash flows.

NEW SKILLS TO BE MASTERED:

- The ability to make the most commonly encountered adjustments to budgeted operating income in determining budgeted cash flow.
- An understanding of the general procedures a business uses to manage its accounts receivable and its accounts payable as part of managing its cash flows.

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- Why would a business budget its cash flow?
- What are the major sources of difference between operating income and cash flow?
- How are these differences accounted for in preparing a cash flow budget?
- What techniques can a business employ in managing its cash flow?

CHAPTER 9

PERIODIC MANAGEMENT ACCOUNTING FUNCTIONS

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- You will be able to identify the various management accounting functions and reports that relate to the periods of the accounting cycle, with an emphasis on monthly and annual reporting of actual results against the budget.
- You will be presented with a variety of management reports that might be suitable in a given business environment, including the bank reconciliation, aged accounts receivable and accounts payable listings, inventory quantities and pricing, key account analysis updates, fixed asset continuity schedules, sales reports, production reports, margin analysis, comparison of operating results to budget and comparison of cash flow to budget.
- You will be able to identify the special account analysis typically required by external accountants at year-end.

In the on-line computerized accounting supplements accompanying this chapter, students will learn how to prepare many of these reports using the accounting software.

NEW SKILLS TO BE MASTERED:

- The ability to identify the categories of management reports that are typically prepared at the various periods in the accounting cycle.
- The ability to prepare these reports and an understanding of how accounting software can be used in automating their preparation.

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What types of management information should be reported monthly and annually?
- What information is presented in the various standard reports presented in this material?
- Where might that information be obtained?
- How might management use that information?

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**- Connie H.M. Zhu
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- > Successfully manage the books for your business
- > Master payroll, managerial accounting, transition and succession planning for a variety of ventures.

1

Bookkeeping in a Digital World

Bookkeeping in a Digital World is the perfect course for professionals in the bookkeeping, tax and financial services who wish to train their administrative staff to prepare company books, or for those with the professional role of preparing books for others.

Knowledge Journal Topics:

- The Roles and Responsibilities of the Bookkeeper
- Types of Organizations, Fiscal Periods and Accounting Cycles
- Types of Accounts, the Basic Accounting Equation and The Chart of Accounts
- General Ledger, Trial Balance and Special Accounts
- Journals, Registers and Ledgers - I
- Journals, Registers and Ledgers - II
- Fundamental Cash-basis and Accrual Accounting
- Period-end Procedures
- Documentation, File Maintenance and Due Dates
- Payroll: An Introduction

2

Accounting for Multiple Business Profiles

In this course, you will learn to manage the bookkeeping functions for a variety of companies to deliver financial results from the simplest to a complex company. Using the features of SAGE 50 and Intuit QuickBooks Desktop, learn advanced bookkeeping for a variety of business profiles.

Knowledge Journal Topics:

- Commonalities of Bookkeeping for Various Business Enterprises
- Advanced Sales Tax Issues
- Partnerships and Joint Ventures
- Builders
- Retail Outlets
- Importers/Exporters
- Agricultural Businesses
- Trusts
- Other Business Profiles
- Not for Profits
- Introduction to Advanced Business Issues

3

Advanced Payroll for Small Businesses

Payroll rule changes have created an increased demand for knowledgeable bookkeepers who can administer payroll. Advanced Payroll will help you become a more astute compliance manager, while being a shrewd negotiator when helping your clients with employment contracts that address the after-tax benefits for employees and their family members.

Knowledge Journal Topics:

- The Payroll Cycle
- Hiring, Employee Contracts, and Employment Standards
- Employee Compensation
- Owner Managers
- Statutory Deductions
- Other Deductions
- Taxable and Tax Free Benefits
- Remittances, Audits and Penalties
- Termination and Severance
- Year-End Reporting

"I started the program because I wanted that piece of paper, and the confidence to do what I do. I run two home-based businesses. That makes it all the more important to me to gain more knowledge and confidence because I do not have anyone to fall back on when I have questions."

- Amanda McAskill, DFA - Bookkeeping Services Specialist™

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- > Ensure clients avoid costly financial mistakes and improve their financial health

4

Managing Tax Audit Risk for Small Business

This online certificate course helps position small business owners for potential tax audits in 2021- 2023 with a concise pathway to navigate the complex rules and comprehensive documentation they will need to satisfy queries from clients and manage risk with the CRA.

Knowledge Journal Topics:

- Tax Compliance Issues
- Intro to GST/HST for Business Profiles
- Non-Profits & Charities
- Basic Accounting Analysis
- Budgeting Basics
- Cash Flow Budgeting
- Decision Making
- Valuation Approaches - Market Based

5

Budgeting & Forecasting For Small Business

This course is perfect for professionals in bookkeeping, tax and financial services to gain the skills needed to assist or direct the budgeting process. This course contains references to IFRS and ASPE as well as an updated QuickBooks example.

Knowledge Journal Topics:

- The Role of the Management Accountant
- Basic Account Analysis
- Introduction to Cost Accounting
- Budgeting Basics
- Fixed Assets
- The Sales/Production Budget
- Other Budget Items
- Cash Flow Budgeting
- Periodic Management Accounting Functions

6

Accounting for Business Growth and Transition

This course addresses a range of areas that might be encountered during the evolution and growth of a company. Those who work in the accounting function will gain an understanding of how to take a leadership role in creating a value centered department that could help to support the growth and development initiatives that occur over the life cycle of a business.

Knowledge Journal Topics:

- Introduction to Organizational Structures
- Consolidated and Combined Financial Statements
- Foreign Currency Transactions
- Purchase of a Business
- Sales of a Business
- The Sale of Assets
- The Sale of Shares
- Business Succession
- Tax Planning in Succession
- The Role of a Value Centered Accounting Function

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About Knowledge Bureau:

Founded by tax expert, award-winning financial educator and best-selling author, Evelyn Jacks in 2003, Knowledge Bureau™ is a widely respected financial education institute and publisher based in Canada. Our world-class education solutions are innovative, informative, and in-depth, with a multi-disciplinary approach to professional development in the tax, accounting, bookkeeping and financial services.

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- Evelyn Jacks, President of Knowledge Bureau

"Everything so far has had value to it. These studies have added to my knowledge and skills and I have put this knowledge to use immediately for our clients or I gained new skills which has given me the opportunity to expand our services."

- William Samplonius, ON

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