



SMALL BUSINESS EQUITY FINANCING FOR ADVISORS

Private Investment | Government Grants | Capital Raising
Early-Stage Innovation | Crowd Sourced Funding | Venture Capital

A self-paced eLearning course for Accountants, Bookkeepers and Consultants wishing to upskill to offer Business Advisory and Virtual CFO Services to SMEs

Unlocking growth with equity financing

In today's fluctuating economic climate, businesses must navigate complex financial landscapes to ensure sustainability and growth.

Small Business Equity Financing is a comprehensive eLearning course designed to equip Business Advisors and Virtual CFOs with the knowledge and tools to guide their clients through various funding options.

This course emphasizes the critical role of equity financing in supporting small and medium-sized enterprises (SMEs).

What's this course all about?

This course provides a detailed understanding of equity financing and its significance for small businesses.

Participants will learn about different funding options, the benefits of equity financing, and how to effectively advise clients on securing investments to foster business growth and resilience.

Learners will have access to a comprehensive resource library of information relating to all key equity financing options for business owners.

This course has been designed and delivered in conjunction with subject matter expert Peter Towers from ESS BIZTOOLS.

Visit essbiztools.com.au



WHAT IS EQUITY FINANCING?

Equity financing involves raising capital through the sale of shares in a company. For small businesses, this means offering a portion of ownership to investors in exchange for funding.

Unlike debt financing, which requires regular repayments, equity financing does not burden the company with ongoing financial liabilities. Instead, investors assume a share of the company's profits and losses, aligning their interests with the business's success.

WHY IS EQUITY FINANCING IMPORTANT?

- **Economic Resilience** As businesses face economic uncertainties, equity financing provides a viable alternative to traditional loans, helping to mitigate financial stress.
- **Growth Potential** By securing investment, businesses can fund expansion plans, innovate, and seize market opportunities.
- **Risk Management** Equity investors often bring valuable expertise and networks, contributing to better decision-making and strategic planning.

THE ROLE OF BUSINESS ADVISORS AND VIRTUAL CFOS

Accountants, Advisors and Virtual CFOs play a pivotal role in guiding business owners through the complex process of securing funding. They provide crucial insights into financial analysis, strategic planning, and risk assessment. This course will enable them to:

1. Establish robust reporting foundations and systems.
2. Develop strategic plans, budgets, forecasts, and cash flows.
3. Continuously improve processes and implement internal controls.
4. Advise on the most suitable financing options.

WHO SHOULD ENROL?

This course is ideal for:

- Accountants aiming to provide comprehensive financial guidance to SMEs.
- Business Advisors and Consultants looking to enhance their advisory services.
- Virtual CFOs seeking to expand their expertise in financing options.
- Entrepreneurs wanting to understand funding opportunities for their businesses.

Equip yourself with the knowledge to navigate the complexities of small business financing and help your clients achieve financial success

For Registration details:

cpdforaccountants.com.au/courses/equity-financing

COURSE CONTENT

This self-paced eLearning course consists of 6 modules:

1. Private Investment

- Private Investment Types and Considerations
- Risk Management and Due Diligence
- Ongoing Monitoring and Reporting
- Benefits for Accounting Firms

2. Government Grants

- Types and Scope of Government Grants
- Eligibility and Application Requirements
- Grant Agreements and Payments
- Benefits and Advisory Opportunities for Accounting Firms

3. Capital Raising - s708 of the Corporations Act

- Understanding Section 708 of the Corporations Act
- Types of Investors and Their Qualifications
- Documentation and Governance
- Benefits and Opportunities for Accounting Firms

4. Early-Stage Innovation

- Legislation and Purpose of Early-Stage Innovation Companies
- Qualification Criteria and Due Diligence
- Investor Benefits and Restrictions
- Opportunities for Accounting Firms

5. Crowd Source Funding and Equity Raising

- Crowd Sourced Funding (CSF) Equity Raising Basics
- Roles and Responsibilities of CSF Intermediaries
- Process and Documentation for CSF Offers
- Benefits and Opportunities for Accounting Firms

6. Venture Capital

- Understanding Venture Capital
- Creating Value and Due Diligence
- Funding Process and Stages
- Role of Advisors and Structuring Capital Raising

CPD – This course is worth 16 CPD hours

All modules are structured with specific learning objectives and assessment tasks. Learners are expected to demonstrate that they understand learning objectives and can apply concepts through completion of the assessment tasks.

A SMART action planning template is used to consolidate specific actions and to ensure that a timeframe for completion is established and followed. Regular review of progress is ensured through commitment to completing the course.

Enrol Today!

Equip yourself with the knowledge to navigate the complexities of small business financing and help your clients achieve financial success. Sign up now for the Small Business Equity Financing eLearning course and take a crucial step towards becoming a trusted advisor in today's dynamic business environment.

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OUR LEARNING PROCESS

Our self-paced eLearning courses follow a 4-step process in relation to learning objectives:



THE ELEARNING ACADEMY

- Learners can complete courses at a place that suits them, within and outside work hours
- Each learner will have a dedicated login to give them personal access to their course
- Module material includes online presentations, workbooks, PowerPoint Slides, templates, scripts and articles
- All modules also incorporate formal qualitative assessment tasks that encourage learners to develop practical actions demonstrating understanding of the concepts
- All assessment tasks are scored, with directed feedback to learners on their response
- As the learner progresses, they develop their personal SMART action list to drive change
- Managers are able to see at a glance how their staff are progressing
- All learners have access to course content for 12 months following their enrolment

FEEDBACK FROM OUR LEARNERS

This course has been a great investment. In time I hope to implement everything I learned, but to be honest, implementing just some learned points is a big stride forward for my business. This course will help my clients, which in turn, will help my business. Helping my clients improve their businesses is good business for me. This course has been the best professional development I have done to help my clients in this way.
[Virtual CFO Advanced]

This was a really good course. Lots of excellent takeaways that can be used quite easily in business. The information flows nicely and covers a vast range of issues in a neat, easy to use package. I would highly recommend this to all accounting professionals at any level.
[Business Development Manager]

This course has been amazing, it allowed me to think beyond the numbers. As we may be aware, the accounting industry is changing with artificial intelligence, so as accountants we need to compete and be able to think beyond numbers to assist the clients. This course has really helped me think analytically rather than just doing numbers but how to interpret them for the clients. This course not only taught the benefits but also any roadblocks and challenges that we may face when trying to implement advisory services to the clients. In conclusion, the course was really great. And five stars for the course.
[Business Analytics for Managers]

A great course that encouraged me to really consider what's important to the client. It's not rocket science, just a clearly defined set of steps that will help me better understand the numbers and add value to client relationships.
[FT – The Business Analyst]

For more course feedback, visit:

cpdforaccountants.com.au/course-feedback

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