

Building Effective Budget Spreadsheets in Excel



Speaker : David H. Ringstrom

Date : 25th June 2018

Time : 12:00 PM PST | 03:00 PM EST

Duration : 90Min

Description:

In this valuable presentation, Excel expert David Ringstrom, CPA, shows you how to create and maintain resilient budget spreadsheets. He shares many helpful techniques, including how to separate inputs from calculations, streamline formula writing, preserve key formulas, create both operating and cash flow budgets, and more. David also explains the uses and benefits of a variety of Excel functions, such as VLOOKUP, SUMIF, and CHOOSE.

Why should you Attend:

David demonstrates every technique at least twice: first, on a PowerPoint slide with numbered steps, and second, in Excel 2016. He'll draw to your attention any differences in Excel 2013, 2010, or 2007 during the presentation as well as in his detailed handouts. David also provides an Excel workbook that includes most of the examples he uses during the webcast.

Areas Covered in the Session:

- Avoiding the complexity of nested IF statements with Excel's CHOOSE function
- Building formulas faster by way of the Use in Formula command
- Building operating budgets quickly based on detailed supporting schedules that provide an audit trail
- Crafting formulas to compute gross margins, projected sales, commissions, and related amounts

- Employing the Name Manager feature to make corrections to range names or store notes about assumptions
- Employing the SUMIF function to sum values related to multiple instances of criteria you specify
- Improving the integrity of budget spreadsheets by isolating all inputs to a single worksheet
- Improving the integrity of spreadsheets with Excel's VLOOKUP function
- Learning how the Table feature empowers you to improve the integrity of Excel spreadsheets
- Preserving key formulas using hide and protect features
- Protecting sensitive information by hiding formulas within an Excel workbook
- Understanding why it's worthwhile to build out supporting schedules to break down calculations used in budgets

Who Will Benefit:

- Accountants
- CPAs
- CFOs
- Controllers
- Income Tax Preparers
- Enrolled Agents
- Financial Consultants
- IT Professionals
- Auditors
- Human Resource Personnel
- Bookkeepers
- Excel Users
- Marketers
- Government Personnel

Speaker Profile:

David H. Ringstrom, CPA, is an author and nationally recognized instructor who teaches scores of webinars each year. His Excel courses are based on over 25 years of consulting and teaching experience. David's mantra is "Either you work Excel, or it works you," so he focuses on what he sees users don't, but should, know about Microsoft Excel. His goal is to empower you to use Excel more effectively.