

Finance Fundamentals for Non-Finance Professionals

Understand the Numbers, Speak the Language, Drive Better Decisions

LEVELUP PRO ACADEMY
Your Trusted Professional Training Service Provider



Course Introduction

In today's results-driven workplace, understanding finance is no longer optional. It is foundational. This training is designed for forward-thinking professionals who want to read, interpret, and use financial reports, such as monthly management accounts, to contribute confidently to business decisions.

If you are not financially literate, you risk being left out of key conversations that shape your department and your career.

This program does not just explain finance. It shows you how to use it through real-life examples, practical exercises, and hands-on data visualization using BI tools. You will walk away with skills you can apply immediately to drive performance and influence decision making.



7 Hours
Comprehensive Training



Interactive
Hands-on Sessions



100% HRDC Claimable
Certified Program



Practical
Real-world Applications

Course Overview

Empowering professionals with the financial confidence and practical skills they need to thrive in any business environment.



Target Audience

- Managers & Supervisors
- Departmental Managers & Team Leads
- Non-finance Executives & Professionals
- Entrepreneurs, Business Owners and C-levels
- Operations Executives & Managers
- Department Heads
- Anyone who wants to be financially confident



Key Benefits

- Understand core finance concepts in plain language
- Read and interpret key financial reports (e.g. monthly management accounts)
- Master P&L, Balance Sheet & Cash Flow fundamentals
- Create, manage, and monitor budgets
- Analyze costs and profitability
- Visualize financial KPIs and empower data-driven decision making using BI dashboards
- Communicate with confidence with finance teams
- Make smarter business decisions backed by numbers
- Boost your business acumen and career credibility



Course Highlights



Hands-on Learning

Interactive workshops and practical exercises



Real-Life Use Cases

Business examples and mini case studies for non-finance roles



Financial Tool Mastery

Practical templates for P&L, Balance Sheet, Cash Flow, and BI dashboards



Action-Oriented Outcomes

Practical steps to apply your new knowledge with confidence

Don't Stay in the Dark

Finance is the language of business — speak it with confidence!

8-Module Comprehensive Curriculum

Structured Learning for Maximum Impact

1 Finance Essentials for Non-Finance Professionals

Finance Isn't Just for the Finance Team.

- Why finance matters
- Finance basics & key principles
- Link numbers to business strategy

2 Mastering the P&L Statement

Understand the P&L, Empower Your Decisions.

- Revenue, costs & expenses
- Gross profits vs EBITDA vs Profit before tax vs Net profit
- Common pitfalls and red flags

3 Understanding the Balance Sheet

No More Intimidation — Just Clear Insights.

- Assets, liabilities, and equity
- How the Balance Sheet connects with P&L
- What the numbers reveal about the financial position

4 Why Cash is King

Master Cash Flow — The Lifeline of Any Business.

- Operating, investing, financing flows
- Managing liquidity and working capital

5 Reading & Interpreting Financial Reports

Decode the Reports That Drive Your Business.

- How to read monthly management accounts
- Variance analysis: actual vs budgeted
- Spot trends and hidden risks

6 Budgets, Forecasts & Cost Management

Plan Smart. Spend Right. Grow Strong.

- How to prepare and manage budgets
- Break-even analysis
- Cost management strategies

7 Data Visualization & BI Reporting

Make Your Data Speak — Visually and Powerfully.

- Turn data into actionable visuals
- Use dashboards to communicate results clearly
- Practical BI tips for non-finance teams

8 Key Takeaways and Summary

Big Ideas. Simple Summary

- Reinforce key concepts
- Tips for collaborating with finance teams



Day Schedule

Foundation Building & Core Skills Development 7 Hours Training

Registration & Welcome

Participant check-in, welcome refreshments, and initial networking

8:45 AM - 9:00 AM

Ice Breaker & Training Objectives

Introduction activities, course expectations, and learning objectives overview

9:00 AM - 9:30 AM

Module 1: Finance Essentials

Understanding basic finance concepts and why they matter to every role

9:30 AM - 10:00 AM

Module 2: P&L Mastery

How to read, interpret, and analyse a profit and loss statement with confidence

10:00 AM - 11:00 AM

Morning Tea Break

Networking break with light refreshments

11:00 AM - 11:15 AM

Module 3: Balance Sheet Basics

Break down assets, liabilities, and equity to see your organisation's financial health

11:15 AM - 12:15 PM

Module 4: Cash Flow Statement

Learn how money moves in and out of the business and how to manage it

12:15 PM - 1:00 PM

Lunch Break

Networking lunch with fellow participants

1:00 PM - 2:00 PM

Module 5: Reading Financial Reports

Practice interpreting monthly management accounts and variance analysis

2:00 PM - 3:00 PM

Module 6: Budgets & Cost Management

Learn to build, monitor, and manage budgets effectively

3:00 PM - 4:00 PM

Afternoon Tea Break

Short break to recharge

4:00 PM - 4:15 PM

Module 7: Data Visualization & BI Reporting

Turn numbers into clear visuals and dashboards for better communication

4:15 PM - 5:00 PM

Module 8: Key Takeaways & Summary

Reinforce key concepts and share practical tips for working with finance teams

5:00 PM - 5:30 PM

Course Completion: 5:30pm

Wrap-up, action planning, certificate presentation, and final networking



Certificate Awarded
Certificate of Completion



Alumni Network
Join our finance-savvy community

Expert Trainer Profile

Learn from Experienced Finance Professional



Ts. Au Soon Yong
HRDC Certified Trainer
Chartered Accountant

Ts. Au Soon Yong has over 20 years of experience as a chartered accountant, Group CFO of listed companies, Big 4 Executive Director, and Group COO managing complex financial operations across multiple sectors. He simplifies finance for non-finance professionals with a clear, practical, real-life approach that sticks.

He has served as the Group COO of a leading F&B retail group with over 150 outlets, overseeing end-to-end operations, finance, supply chain, technology, corporate strategy, and business planning across multiple brands.

Previously, he was the Group CFO of a listed company in both Malaysia and Singapore, and held the position of Executive Director at an international Big 4 accounting and consultancy firm, leading data-driven transformation and finance initiatives across diverse industries.

As a qualified chartered accountant with extensive, hands-on experience in accounting and finance, he has strengthened financial processes, management reporting, and controls across multiple businesses. He leverages data and analytics to help organizations make clearer, smarter decisions and ensure that finance functions add real strategic value.

He also serves as an Industry Advisory Panel (IAP) member for several universities, contributing to curriculum development in digital finance, business, and technology. With global exposure spanning the UK, US, China, and Southeast Asia, Soon Yong is well-equipped to train professionals and organizations in financial management, process optimization, operational leadership, and technology-led transformation.

Professional Certifications & Credentials



Professional Technologist
(Ts.) - MBOT



Microsoft MCSE
Data Management & Analytics



Certified Data Science
Specialist (CDSS)



FCCA
(UK)



Chartered Accountant
MIA Member



ASEAN CPA
Chartered Professional Accountant



CFE
Certified Fraud Examiner



Industry Advisory
Panel Member



HRDC Certified
Trainer

150+

F&B Outlets Managed

20+

Years Working Experience

10+

Years Training Experience

Investment & Registration

Time to level up your future. Invest in yourself.

Regular Rate

RM1,450

per participant

Standard Pricing

Early Bird Special

RM1,200

per participant

Save RM250!

Group Rate

RM1,050

per participant

Save RM400!
Min. 4 Participants



100% HRDC Claimable Training Program

This course is approved under the Human Resources Development Corporation (HRDC) scheme. Companies can claim back training costs through HRDC, making this investment even more valuable for your organization.



What's Included

- Comprehensive training materials
- Hands-on workshops and labs
- Professional completion certificate
- Lunch and refreshments
- Networking opportunities
- Digital resources and templates

HRDC Registration Steps

1. Complete course confirmation form
2. Receive confirmation and HRDC details
3. Apply for HRDC grant in e-TRiS
4. Provide proof of grant submission to secure seats
5. Receive course materials during the training class

Non-HRDC (Self/Company Pay) Registration Steps

1. Complete course confirmation form
2. Receive confirmation and payment details
3. Remit payment to LEVEL UP PRO ACADEMY to secure seats (refer to page 9 for bank details)
4. Receive course materials during the training class

About LEVELUP PRO ACADEMY

Your Trusted Partner in Professional Growth

LEVELUP PRO ACADEMY



info@levelup2pro.com



www.levelup2pro.com

LEVELUP PRO ACADEMY is a leading provider of professional training and upskilling solutions, committed to empowering individuals and organizations with future-ready capabilities in AI, data analytics, digital transformation, leadership, and finance.

Our programs are designed and delivered by industry practitioners with real-world experience, ensuring practical insights and immediate application. Whether you're looking to elevate your team's performance or future-proof your career, LEVELUP PRO ACADEMY is your trusted partner in continuous learning and professional growth.



Why Choose Us

- Industry-leading practitioners as trainers with strong finance and business backgrounds
- Real-life, practical training approaches
- HRDC-approved training programs
- Customizable corporate training solutions
- Continuous learning support



Our Commitment

- Future-ready finance, business, and digital skill development
- Immediate practical application
- Personalized learning experiences
- Long-term professional relationships
- Measurable learning outcomes

Learn with LEVELUP PRO ACADEMY

Join organizations and professionals worldwide who trust LEVELUP PRO ACADEMY for their learning and development needs. Whether you're an individual looking to advance your career or an organization seeking to upskill your team, we're here to support your journey.

500+

Professionals Trained

50+

Corporate Clients

95%

Satisfaction Rate

Take Charge of Your Financial Confidence

The future of work runs on numbers – make sure you can speak the language.

The Choice is Yours



Without AI Skills

- Watch others lead the conversation while you get left out
- Struggle to interpret reports and budgets
- Miss chances to influence decisions
- Risk being overlooked for bigger roles
- Feel uncertain when financial discussions arise



With AI Mastery

- Contribute confidently to business discussions
- Understand key financial reports and numbers
- Make smarter decisions backed by data
- Add real strategic value to your team and organization
- Grow your career prospects and credibility

Important Notes

1. As a registered employer with HRD Corp, you have the opportunity to apply for the SBL-Khas training grant through HRD Corp. This grant is fully claimable, covering 100% of the programme fees.
2. In the event that the HRD Corp claim is unsuccessful, full payment must be made at least seven (7) days prior to the scheduled training.
3. All payments must be made through bank transfer to the account of LEVELUP PRO ACADEMY Please use the following banking details:
 - Bank Name: Affin Bank Berhad
 - Account Number: 100980223823
 - Swift Code: PHBMMYKL
4. Services provided by LEVELUP PRO ACADEMY are strictly non-returnable and non-refundable. Upon registration, participants are deemed successfully enrolled in the event, and any fee paid is non-refundable.
5. Please be informed that the full fee will be charged for the cancellation of a confirmed registration. However, substitution of participant(s) from the same organization is allowed with prior written notice at least three (3) working days before the training date. Failure to provide notice will result in forfeiture of the training seat.
6. LEVELUP PRO ACADEMY reserves the right to change, postpone, or cancel the date, venue, facilitator, or content of the program. Every effort will be made to inform participants of any such changes in advance, if applicable.

Start Your Finance Journey Today

Ready to Transform Your Future?

Register now for "Finance Fundamentals for Non-Finance Professionals"



Learn More



info@levelup2pro.com



www.levelup2pro.com

LEVELUP PRO ACADEMY

Your Trusted Professional Training Provider

Course Confirmation Form

Your Gateway to Finance Confidence Starts Here

Finance Fundamentals for Non-Finance Professionals

Professional Training Program Registration

Date: 5 September 2025

Venue: Menara Biomed, 13, Jalan Cempaka SD 12/5,

Time: 8:45AM to 5:00PM

Bandar Sri Damansara, 5220 Kuala Lumpur.

Name : _____

Contact Number : _____

Email Address : _____

Number of Participants : _____

Company Name
(if applicable) : _____



Pricing Selection

☐

Regular Rate
RM1,450
per participant

☐

Early Bird
RM1,200
per participant

☐

Group Rate
RM1,050
per participant

Authorization

Company Stamp

Name: _____

Position: _____

Important Notes

- This course is HRDC claimable for registered companies
- Early bird rates are available until the registration deadline on 4 August 2025
- Group rates apply for minimum four (4) participants from same organization
- Participants are required to bring a laptop, tablet, or phone to the training
- Course materials, certificates and refreshments are included in the training fee