



Instructor: Vin DiCara

## ANALYZING PERSONAL FINANCIAL STATEMENTS & INCOME TAX RETURNS

Course #: C6002L

Comfort Inn, 213 Paine Turnpike N, Montpelier, Vermont

NOVEMBER 26, 2019—9:00AM—4:00PM

### course description

Designed for professionals who require an understanding of the importance of information contained in individual tax returns and personal financial statements such as retail lenders, branch managers, assistant branch managers, commercial lenders and credit analysts.

Designed to assist those engaged in lending to interpret federal tax return forms and schedules as well as personal financial statements to help identify the borrowing capability of customers.

Course topics include:

- Understanding tax returns sections that determine a borrower's ability to repay loans
- Identify cash inflows/outflows from tax returns
- Importance of Personal Financial Statements
- Understanding small business cash flow (sole proprietorships, partnerships, LLCs, etc.)

Looking for more details? [Visit our website](#) for a detailed course and certification description.

### how to enroll

Enroll online at our website, [CFTEA.org](#) under Lending.

### how class works

Course session is conducted live with multiple case studies. This course is part of Certified Business Credit & Tax Return Analyst.

### tuition

\$325 per participant. Lunch and materials are included. Updated to include 2018 changes.

### withdrawal policy

CFTEA withdrawal policy is outlined within our latest catalog and on our website. Before class begins the enrollment may be transferred to another student with the approval of the student's employer and the CFTEA office.

### Certified Business Credit & Tax Return Analyst

Analyzing Personal Financial Statements & Tax Returns—

11/26 Montpelier, VT

Analyzing the Tax Returns of Businesses—

11/27 Montpelier, VT

See requirements for Certified Business Credit Analyst

Looking for this course in your local area?  
Contact the CFTEA office for details.