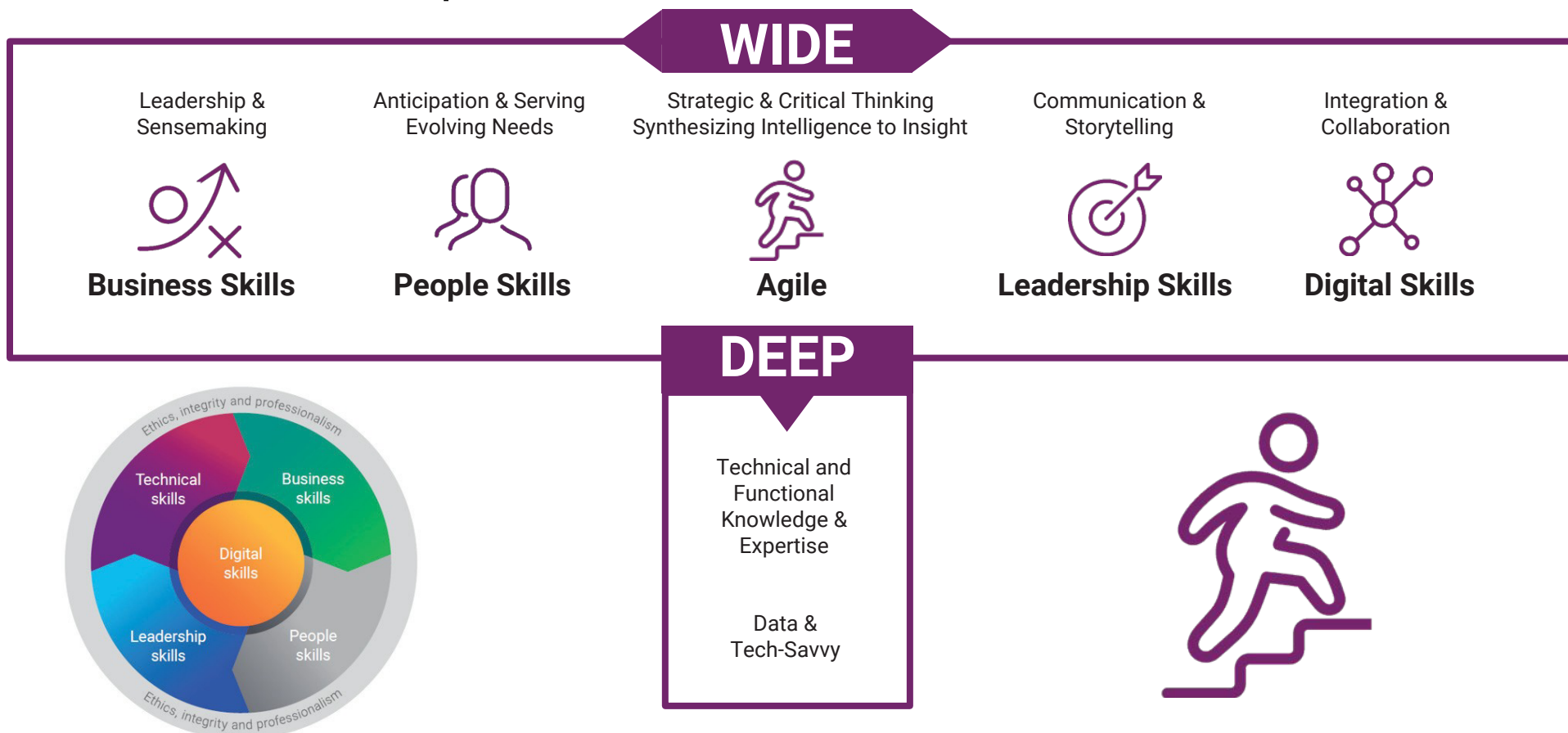


The T-Shaped Finance/Accounting Professional Boundary Crossing Competencies



The CGMA Finance Leadership Program

Strategic Case Study Exam

Strategic Management

Competitive Advantage
Strategy Formulation
Strategy Implementation
Digital Strategy



Strategy Management Skills
Certificate

Risk Management

Enterprise Risk Management
Strategic Risk
Internal Control
Cybersecurity



Enterprise Risk Management
Skills Certificate

Financial Strategy

Financial Policies & Objectives
Debt and Equity Finance
Financial Risks
Business Valuation & Acquisitions



Corporate Financial Strategy
Skills Certificate

Management Case Study Exam



Diploma in Advanced Management Accounting

Performance & Project Mgmt

Business Models
Leading and Managing People
Project Management



Team Performance
Management Skills Certificate

Advanced Mgmt Accounting

Cost Competitiveness
Organizational Performance
Pricing & Capital Investment
Decisions
Managing Risk & Uncertainty



Financial Planning and
Analysis Skills Certificate

Advanced Financial Reporting

Advanced Financial Statements
Complex Group Reporting
Financial Statement Analysis
Long-term Financing



Financial Statement Analysis
Skills Certificate

Operational Case Study Exam



Diploma in Management Accounting

Digital Finance

Finance Function Transformation
Finance Business Partnering
Data and Analytics



Digital Finance Skills
Certificate

Management Accounting

Cost Accounting
Budgeting and Planning
Short-term Decision Making



Budget and Cost Analysis
Skills Certificate

Financial Reporting

Regulatory Environment
Financial Statements
Principles of Taxation
Managing Working Capital



Financial Reporting Skills
Certificate

Enterprise Pillar

Performance Pillar

Financial Pillar

Foundation Level - Business & Finance Essentials



Business and Finance
Essentials Skills Certificate

Non business
related 4-Year
Degree, 2-Year
Degree & High
School Pathways

Development Pathways to CGMA Designation

CPA Path

Master's Degree or MBA
Concentration in Finance or
Accounting

Four-year Degree in Finance or
Accounting

MBA Concentration Other than
Finance or Accounting

Four-year Degree – Business
related, non-financial

All learning and exams are based
on experiential case studies where
your staff will learn the language
and techniques of your corporate
clients and CFOs.

Invest in Recruiting and Growing Your Own - Maryland

- Registered Apprenticeship for Finance Business Partners
- Youth Apprenticeship in Finance and Accounting
- School to Apprenticeship

We represent 700,000 CPAs, CGMAs, Finance & Accounting Professionals worldwide in 192 countries, of which 416,000 are in the USA.

Always evolving.

Transforming the Global Accounting Profession by Powering Trust, Opportunity, and Prosperity Worldwide

Our program is Market Driven and supported by Hard Trends



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Worldwide leaders in public and management accounting

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IBM

KET
Solutions
KNOWLEDGE, EMPOWERMENT, TECHNOLOGY

Kimberly-Clark

KK Solutions Inc

LIBERTY
BANK

MARS
WRIGLEY

MERCK

MGM RESORTS
INTERNATIONAL

NIKE

official COMMUNITY

Prudential

randstad

REALTERM

RIGHT
ADVISORY

Russell
Reynolds
ASSOCIATES

SCH
GROUP

Stanley
Black &
Decker

Swiss Re

TADA

TD

Ted's
MONTANA GRILL
Authentic American Dining

teradata

Tetra Pak
PROTECTS WHAT'S GOOD

verizon

WISCONSIN
UNIVERSITY OF WISCONSIN-MADISON

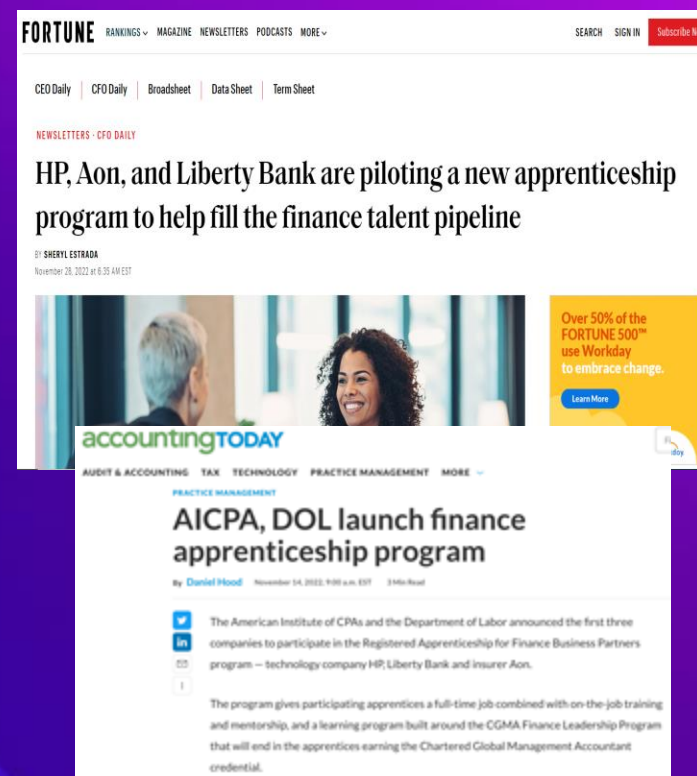
workday

yelp

Registered Apprenticeship For Finance Business Partners

US Apprenticeship launch

- Announced by Secretary Walsh as 1 of 3 new innovative professional apprenticeships for 2022
- Certifies Finance Leadership Program as required instruction
- Redesigned to include a 2-year path under pilot program



Mike Neller - AON, Paul Young - Liberty Bank, Brittany Masalosalo- HP, Labor Secy Marty Walsh, and Tom Hood AICPA-CIMA at National Apprenticeship Week kick-off in Chicago



Launched in Maryland

- Maryland selected as first state to register in
- \$120k in funding covers cost of AICPA learning
- Partnering with Maryland Association of CPAs
- Developing Youth Apprenticeship under Maryland Works Grant

MARYLAND

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Our best, right now.

Judge appoints conservator to take over Angeles law firm

by Madeline O'Neill | Feb. 2

Baltimore couple who lost belongings under eviction rule wins \$180k verdict

by Madeline O'Neill | Feb. 2

Hd. court hears victim's appeal of hearing that freed Adnan Syed

by Steve Lash | Feb. 2

Plan would fold Md. medical recreational cannabis markets into one regulated industry

by Bryan R. Sears | Feb. 2

Floore emphasizes public service in 1st State of the State address

by Bryan R. Sears | Feb. 1

AICPA receives finance business partner grant for Md. apprentices

By Daily Record Staff | September 21, 2022

The American Institute of Certified Public Accountants (AICPA) Wednesday announced it has received a grant of nearly \$120,000 from the Maryland Department of Labor to expand its Registered Apprenticeship for Finance Business Partners in the state.

The funds from the grant will cover instruction-related costs for a minimum of 25 new apprentices.

Through the state's Apprenticeship and Training Program, more than 12,000 apprentices are registered to be trained in new job skills with 3,879 employers across the state.

The apprenticeship program creates a new path for those looking to pursue accounting and finance careers while residing

AICPA



Related Instruction - the CGMA Finance Leadership Program

The CGMA Finance Leadership Program is a guided, digital learning and assessment route ideally positioned to accelerate the development of early career finance business partners

Builds finance competency across a broad set of technical, business, digital, people and leadership skills

Focus on real world application and knowledge integration in a digital world



The CGMA Finance Leadership Program

Development Pathways to CGMA Designation

CPA Path

Master's Degree or MBA Concentration in Finance or Accounting

Four-year Degree in Finance or Accounting

MBA Concentration Other than Finance or Accounting

Four-year Degree – Business related, non-financial

All learning and exams are based on experiential case studies where your staff will learn the language and techniques of your corporate clients and CFOs.

Strategic Case Study Exam

Strategic Management

- Competitive Advantage
- Strategy Formulation
- Strategy Implementation
- Digital Strategy

Strategy Management Skills Certificate

Risk Management

- Enterprise Risk Management
- Strategic Risk
- Internal Control
- Cybersecurity

Enterprise Risk Management Skills Certificate

Financial Strategy

- Financial Policies and Objectives
- Debt and Equity Finance
- Financial Risks
- Business Valuation and Acquisitions

Corporate Financial Strategy Skills Certificate

Management Case Study Exam

Diploma in Advanced Management Accounting

Performance and Project Mgmt.

- Business Models
- Leading and Managing People
- Project Management

Team Performance Management Skills Certificate

Advanced Mgmt. Accounting

- Cost Competitiveness
- Organizational Performance
- Pricing and Capital Investment Decisions
- Managing Risk and Uncertainty

Financial Planning and Analysis Skills Certificate

Advanced Financial Reporting

- Advanced Financial Statements
- Complex Group Reporting
- Financial Statement Analysis
- Long-term financing

Financial Statement Analysis Skills Certificate

Operational Case Study Exam

Diploma in Management Accounting

Digital Finance

- Finance Function Transformation
- Finance Business Partnering
- Data and Analytics

Digital Finance Skills Certificate

Management Accounting

- Cost Accounting
- Budgeting and Planning
- Short-term Decision Making

Budget and Cost Analysis Skills Certificate

Financial Reporting

- Regulatory Environment
- Financial Statements
- Principles of Taxation
- Managing Working Capital

Financial Reporting Skills Certificate

Enterprise Pillar

Performance Pillar

Financial Pillar

Foundation Level - Business & Finance Essentials

Non business related
4-Year Degree, 2-
Year Degree & High
School Pathways

Business and Finance Essentials – For high school students

Business and Finance Essentials

- Digital
- On the FLP platform
- 25-30 hours of actual learning
- About a 3-month program for students balancing with another commitment

Introduction to business and finance (10 study topics/modules)

Getting started in business and finance
Ethics in business
Business ecosystems
Global commerce

Business in society
Business functions
Economic environment

Governance in business
Finance function
Commercial relationships

Skillsets:

- Describe the role and structure of business and the finance function;
- Describe the wider environment in which businesses operate

Introduction to financial accounting (5 study topics/modules)

Accounting information
Accounting for purchases

Financial transactions
Accounting for sales

Financial statements

- Apply double-entry bookkeeping principles to prepare financial statements
- Explain how to account for purchases and sales

Introduction to management accounting (8 study topics/modules)

Product costing
Performance measurement
Sources of finance

Product pricing
Short-term financial decisions
Raising finance

Budgeting
Capital investment decisions

- Describe methods of pricing, costing, budgeting, and performance measurement
- Explain the factor affecting short and long-term financial decisions



Partnering with
academic institutions
nationally and in
Maryland to enable
students to earn a
college degree and the
CGMA while working



Excelsior Univ. – up to 15 credits towards 60 credits AA in Management Studies for completing FLP; 3 credits for passing all exams; 17 credits for OJT/prior learning.

Univ. of Phoenix – up to 45 credits towards 60 credit AA in a Professional Focus

Franklin Univ. – up to 19 credits for completing FLP, no set amount for OJT towards 64 credits for AS in either Accounting or Finance

Employer Feedback

"I chose Liberty Bank to participate in the AICPA Apprenticeship Program because I just thought it was something that perfectly fit what we were trying to accomplish as an organization. I was struggling with how to expand recruitment and upskill the talent on the team and this provides a solution"

Paul Young, CFO, Liberty Bank

"Attracting the right candidates has become more complex, and companies need to find alternative ways to engage potential talent. Apprentices bring new perspectives and life experiences, benefiting our workplace, our clients and our communities."

Marc Armstrong, Managing Partner, Aon



"Diversity is a business imperative; when we attract and nurture people from diverse backgrounds and increase their representation in the workplace, we strengthen a company's business objectives."

Marie Myers, CFO at HP

CGMA Finance Leadership Program

Subscription Options and Pricing

1 year	2 year	3 year
\$2,500	\$4,250	\$6,375

All Access

Learning

Access to all 3 levels

Certificates

Certificates for completing all learning in bundled topic areas

Diplomas

Diplomas for completing the Operational and Management levels and passing exams

Review

All review courses for required exams

Exams

Two free exam credits per required case study

Membership

AICPA Membership

Youth Apprenticeships and School to Apprenticeship

Maryland Works Grant Team



Matt McKenney

IAA
CEO



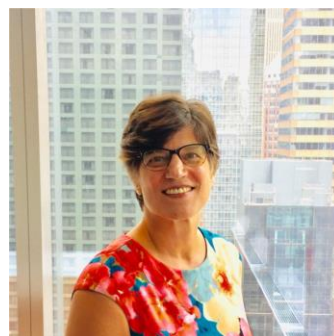
Lisa Tellstone

IAA
Director of Grants



**Rebecca
Hollister**

IAA
Project Leader



Joanne Fiore

AICPA-CIMA
Vice President



Angela Rogers

SHRM Foundation
Apprenticeship Manager



Ellen Flowers-Fields

College of Southern Maryland
Vice President



Youth Apprenticeship Curriculum – 120 hours Proposed

Business and Finance Foundational Level – 35 hrs.

- Intro to Business and Finance
- Intro to Management Accounting
- Intro to Financial Accounting

One part of the Operational Level as selected by employer but allow access to all - 35 Hours

- Digital Finance (35 hrs.)
- Management Accounting (35 hrs.)
- Financial Reporting and Tax (35 hrs.)

MACPA Student Leadership Academy – 16 hrs.

- 2-day program that teaches success skills and intro to the profession; introduces students to accountants

Think Like an Entrepreneur – 22 hrs.

- Color Accounting curriculum?

Youth Apprentice Coaching – 12 hrs

Status of AICPA Program in Maryland after 12 mos

AICPA's apprenticeship program has been very well received by employers of all sizes, after an initial period to educate on apprenticeships

9 Employers registered or are under contract about to be registered, including major employers Marriott, Stanley Black and Decker and CareFirst covering about 60 apprentices.

7 Additional employers are in negotiation

AICPA began discussions about youth apprenticeships last week with employers



Thank you

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