# Credit Analysis for SMEs Case Study Workshop (Part 2) (re-run)

**Programme Code: W100318S** 

Speaker Mr. J Wong, CPA (Aust.), CPA

Being a masters degree holder, Mr. Wong is an informed practitioner with about 15 years' hands-on credit, financial and risk assessment experience for leading international banks, including UBS and Morgan Stanley. An in-depth knowledge of accounting and finance, together with solid real-life working experience, fostered the speaker's successful training approach which blends state-of-the-art practices with outstanding technical skills.

Over the years, Mr. Wong has received high appreciation of his practical training and lectures delivered to major banks, professional institutes and universities, including HKICPA, CPA Australia, Hong Kong Institute of Bankers and Hong Kong Baptist

University.

 Date
 Thursday, 18 March 2010

 Time
 6:30 p.m. - 10:00 p.m.

Venue Hong Kong Institute of CPAs Training Centre, 27/F., Wu Chung House,

213 Queen's Road East, Wanchai, Hong Kong

Enrolment fee HK\$800 for HKICPA member or student; and IA / HKIAAT's member or student

HK\$1,550 for non-member

**Language** Cantonese

Format Workshop, including case study

Competency Business Finance\*

Rating Advanced Level\* - Advanced understanding of the knowledge area. The ability to

apply knowledge and skills to complex non-routine situations. Troubleshoot most

situations in the absence of complete or consistent data/information.

Target audience CPAs who attended Analysing Financial Statements for Accountants, Credit Analysis

for SMEs Case Study Workshop (Part 1) or have a good understanding and application

of Financial Statements' Analysis

CPD credit 3.5 hours

### About the programme

This workshop is a continuation of Credit Analysis for SMEs Case Study Workshop (Part 1). The purpose of the workshop is to enable accountants to understand how banks deal with different types of SMEs in Hong Kong. Key financial ratios that banks employ to evaluate the credit worthiness of SMEs will also be discussed in this workshop.

- 1. Lending to Different Types of SMEs
  - Holding Companies
  - Shell Companies
  - Start-up Financing
  - Companies with Negative Net Worth
  - Inferior New Security Position

- 2. Ratio Analysis of SMEs
  - Liquidity Ratio
  - Gearing Ratio
  - Activity Ratio
- 3. Case Study

<sup>\*</sup> Please refer here for descriptions of other competencies and ratings.

#### HONG KONG INSTITUTE OF CERTIFIED PUBLIC ACCOUNTANTS

## CPD ENROLMENT FORM (For Support Programme)

To confirm your CPD booking, just log on to "MyCPA" at http://www.hkicpa.org.hk

Operation & Finance Department, Hong Kong Institute of CPAs, 37/F, Wu Chung House, 213 Queen's Road East, Hong Kong

Payment & Enrolment Status Enquiry: 2287 7381

: 2893 9853

e-mail: finance@hkicpa.org.hk

Course Information Enquiry: 2287 7386

e-mail:cpd@hkicpa.org.hk

FOR OFFICE USE

#### Deadline: 7 working days before the date of the programme

Full Name of Participant(s)

No.	No.	Status (1)	(Block Letters)	Compa	ny	System <sup>(2)</sup>		)	Code		(HK\$)			
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Cardholder's Name : (Please print)				Card Expiry Date (month/year) :										
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Note			tus: <b>NP</b> = Non-Practising, <b>P</b> = Prac	tising, IA = Internati	onal Affili	ate, <b>S</b>	= Student	HKIAA	T = HK	(IAAT Stu	dent	or Me	embe	ır,

- - Please put a "v" in this column to indicate you wish to register by Computerized Ticketing System. Instead of a ticket you will receive a confirmation receipt by 2. post. Details of the system can be found at <a href="http://www.hkicpa.org.hk/membership/cpd/ticket.php">http://www.hkicpa.org.hk/membership/cpd/ticket.php</a>.
  - All applications are on a first-come-first-served basis. In the event of over-subscription, priority will be given to members and students of HKICPA.
  - Application by fax will ONLY be accepted when payment is made by Visa/Master credit card. Please ensure all the particulars relating to payment are completed, otherwise the application cannot be processed. There is NO need to send in the enrolment form again if it has already been faxed to the institute. Cheque(s) should be made payable to "Hong Kong Institute of Certified Public Accountants". Please issue SEPARATE CHEQUE for each event.

- Successful applicants will receive admission ticket or confirmation notice (for those who opt for Computerised Ticketing System) at least 3 working days before the event. Unsuccessful applicants will also be notified around the same time. If you have not heard from the Institute regarding your registration 2 days before the event and if you have other enquiries related to the programme, please make enquiry at 2287 7386 or 2287 7253.
- NO REFUND/CANCELLATION will be entertained after the application is processed. If you are unable to attend the enrolled programme, you may nominate a 7 substitute to take your place, provided that the Institute is notified in writing at least two working days prior to the event date.
- 8. All scheduled events will be cancelled and postponed to a date to be announced in the event of typhoon signal no. 8 or above or if a Black Rainstorm warning is hoisted. For details of bad weather arrangement for CPD programmes, please refer to the Institute's homepage.
- The Institute reserves the right to change the venue, date or speaker of the event due to unforeseen circumstances
- 10. All personal data collected from the enrolment process, and administration of the CPD Programmes will only be used for the purpose of the administration of the course on which members are enrolled.

Please fill in the following label CLEARLY for mailing of admission ticket:

Name :	Name :
Company :	Company :
Address :	Address :