



PanAfrica Annex

SCHOOL OF LEADERSHIP

LEAD • INSPIRE • IMPACT

CERTIFIED BUDGETING & FINANCIAL PLANNING COURSE



Live Online Sessions



**Practical Case
Studies**



Professional Certification

PanAfrica Annex School of Leadership

Developing Africa's Future Leaders Through Practical Learning

Introduction

The 4-week Certified Budgeting & Financial Planning Professional (CBFPP) course equips participants with practical skills in budgeting, financial planning, cost management, financial analysis, and resource allocation. The training combines live online sessions, practical exercises, assessments, and real-world case studies to prepare participants for effective financial management and decision-making roles.

Live Sessions

Interactive online sessions delivered by experienced facilitators, focusing on practical budgeting techniques, financial planning strategies, cost control, financial reporting, and real-world financial management applications.

Self-Paced Learning

Participants receive notes, practical exercises, recordings, and assessment questions to reinforce learning and support continuous progress.

Course Completion Requirements

- ✓ Complete weekly assessments
- ✓ Participate in live sessions
- ✓ Submit practical assignments
- ✓ Complete the final practical project
- ✓ Fulfill registration requirements

Note: A CMEP Certificate will be awarded upon successful completion.

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WEEK 1

DAY	TOPIC	KEY LEARNING AREA
DAY 1	Introduction to Financial Planning	• Principles and Importance of Financial Planning • Budgeting in Personal and Organizational Finance • Financial Goals and Planning Strategies • Principles of Sound Financial Management
DAY 2	Basics of Budgeting	• Types and Components of Budgets • Budget Development Process and Cycle • Income, Expenses and Savings Planning • Effective Budget Management Techniques
DAY 3	Income Management	• Active and Passive Sources of Income • Income Tracking and Monitoring Methods • Income Forecasting and Planning • Managing Irregular Sources of Income

Online self-assessment Quiz 1



WEEK 2

DAY	TOPIC	KEY LEARNING AREA
DAY 4	Expense Management	• Fixed and Variable Expense Management • Needs and Wants Classification • Expense Tracking Tools and Techniques • Cost Control and Spending Management
DAY 5	Saving and Investment Planning	• Importance and Types of Savings • Emergency and Long-Term Financial Planning • Investment Fundamentals, Risk and Return • Diversification and Wealth Building Strategies
DAY 6	Budget Preparation Techniques	• Steps in Preparing Effective Budgets • Zero-Based and Cash Flow Budgeting • Envelope Budgeting Method • Digital Budgeting Tools and Applications
Online self-assessment Quiz 2		



WEEK 3

DAY	TOPIC	KEY LEARNING AREA
DAY 7	Personal Financial Planning	• Setting Short, Medium and Long-Term Goals • Retirement and Life Financial Planning • Education and Family Financial Planning • Debt Management and Repayment Strategies
DAY 8	Business Budgeting	• Operational and Capital Budgeting • Cash Flow and Profit Planning • Budget Variance Analysis • Financial Performance Monitoring
DAY 9	Debt Management	• Good and Bad Debt Management • Debt Consolidation Strategies • Interest Rates and Loan Repayment Planning • Credit Management and Credit Scores

Online self-assessment Quiz 3



WEEK 4

DAY	TOPIC	KEY LEARNING AREA
DAY 10	Financial Risk Management	• Types of Financial Risks • Insurance and Emergency Fund Planning • Risk Mitigation and Protection Strategies • Financial Security Planning
DAY 11	Financial Control and Monitoring	• Budget Monitoring and Tracking Techniques • Variance Analysis and Financial Reporting • Financial Performance Measurement • Corrective Actions and Budget Improvement
DAY 12	Use of Technology in Budgeting	• Budgeting Software and Financial Applications • Spreadsheet Budgeting Using Excel and Google Sheets • Digital Financial Tracking Tools • Automation in Financial Planning

Online self-assessment Quiz 4