



EDUCATION FINANCE

Education Finance Limited
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Financial Seminar for School Principals, Trustees and Administrators

Education Finance, and our presenter Campbell Waugh, have been delivering training courses for schools for over 25 years and have a reputation for delivering relevant, easy to understand courses. The content is based on knowledge from working with schools on a daily basis and will be practical and topical, rather than theoretical.

The Course

This extremely popular course has been reformatted and updated to cover a range of new issues facing schools. It will be presented in a clear, straight forward fashion suited to the average non accountant.

Who Should Attend?

Principals, Trustees and Administrators who will gain an insight into their role in the financial management of their school. Hundreds of Principals and Trustees have attended this course in past years, many having returned for a second or third time due to the valuable information they gained from attending. It is ideally suited to new Trustees.

Course Content

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| <i>Financial Roles of Principal/Board</i> | Especially relevant for new Trustees |
| <i>Financial Risks & Fraud</i> | What are the main risks to your school's financial wellbeing? How to identify risks? |
| <i>Monthly Reports</i> | How to present them—how to read them |
| <i>Annual Accounts</i> | The key points in 5 minutes. What is your financial position? |
| <i>Property Projects / Plans</i> | Understanding the link between property plan / accounts. What is cyclical Maintenance? |
| <i>School "Fees"/Discretionary Grant</i> | What can we require parents to pay and what can we request as a donation? Are you breaching the law? Will you be the next school chastised in the media? |
| <i>Budgets</i> | Highlighting the key area's |
| <i>Banked Staffing Reports</i> | How to read them and what is their impact on your finances? The most cost-effective way to use your staffing entitlement. |

The Presenter

Course presenter, Campbell Waugh, is the Managing Director of Education Finance Ltd. Education Finance specialise in providing accounting services to schools and has operated since 1994, originally from a base in Taranaki, and now also in Invercargill and Takapuna. Campbell has 25 years' experience providing accounting services to schools during which time he has presented numerous training courses to school Principals, Administrators and Trustees. Campbell also has previously been a contracted provider of training to Schools by Massey University.

Numerous Principals, Staff and Trustees have attended past seminars and indicated how useful they found the information presented. Past seminars have resulted in many positive letters from attendees commenting on the down to earth and non-technical explanations that make his course material simple to understand.

"Just a note to thank you for the excellent presentation you did. I have to say that for all the finance and property courses I have been on yours was very well presented, easy to understand and full of useful information ... It would have been absolutely lifesaving to have had this information at the beginning of my time as principal"

"I attended your seminar in Albany together with our Acting Principal, and two members of our Board. We were very impressed with your presentation and the content of the course".

Campbell will be available for your questions after the seminar

Providing Quality Personalised Accounting Services To Schools For Over 25 Years

2023 Seminars - NOTE: SPECIFIC VENUES MAY BE ORGANISED ON REQUEST

South Island – Evening Sessions

6.45pm – 9.30pm (includes coffee/tea break at 8.15pm)

Christchurch – Monday 14th August 2023 – **Peppers Clearwater Resort**, Clearwater Avenue Northwood, Christchurch

West Coast – Tuesday 15th August 2023 – **Ashley Hotel**, 74 Tasman Street, Greymouth 7805

Invercargill – Tuesday 22nd August 2023 – **Ascot Park Hotel**, 41 Racecourse Road, Invercargill 9840

North Island – Afternoon Sessions

1.15pm – 4.00pm (includes coffee/tea break at 2.45pm)

Auckland – Monday 28th August 2023 – **Best Western Ellerslie International Hotel**, 2 Wilkinson Road, Ellerslie 1060

Pukekohe – Monday 11th September 2023 – **Franklin Club Pukekohe**, 7 East Street, Pukekohe 2120

North Shore – Monday 4th September 2023 – **Albany Executive Motor Inn**, 15 Corinthian Drive, Albany

North Island – Evening Sessions

6.45pm – 9.30pm (includes coffee/tea break at 8.15pm)

Auckland – Monday 28th August 2023 – **Best Western Ellerslie International Hotel**, 2 Wilkinson Road, Ellerslie 1060

North Shore – Monday 4th September 2023 – **Albany Executive Motor Inn**, 15 Corinthian Drive, Albany

To Register: Email: wendy@educationfinance.co.nz

Name/s:

Name of School:

Phone:

Email Contact:

Course Venue:

Session Time:

Cost Per Seminar: 1 Attendee \$100; 2 Attendees \$175; 3 Or More Attendees \$200 (GST Inclusive)

A Tax Invoice will be issued to confirm registration.