

# WALL STREET INSTITUTE® (WSI)

*...Empowerment Tools For Successful Business*



**WORLD-CLASS FINANCIAL TRAINING**

## **PROGRAM GUIDE**

### **PRODUCED BY:**



NEW ERA CAPITAL CORP  
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Chamberlain S. Peterside, Ph.D/CEO

### **IN PARTNERSHIP WITH:**

LAW OFFICE OF  
STERLING PARTNERSHIP LTD  
#109 Awolowo Road, 4<sup>th</sup> Floor  
South West Ikoyi, Lagos, Nigeria  
Boma Ozobia, Managing Partner

## **PROGRAM OUTLINE**

### **1) OBJECTIVE**

The WSI financial training program is designed to bridge the manpower gap in the financial services industry especially in the specialized skills that are currently non-available in Nigeria/West Africa. Thereby helping to define, build and finance the economic and infrastructural revival of the country/region.

### **2) PROGRAM FOCUS**

- Identifying Bankable Deals, Projects and Companies;
- Originating, Closing and Executing Viable Projects;
- Writing “Wall Street-Standard” Financial Proposals/Business Plans/Reports;
- Structured Financial Products/Services, Risk Management;
- Financial Modeling/Spreadsheets – Structuring and Understanding them;
- Sourcing of debt/equity funding from the local and international financial markets for public/private initiatives;
- The role of financial institutions and government agencies in infrastructural development of the country, scenarios for originating projects and financing option by federal, state and local governments;
- Development and infrastructure projects reporting in the media;
- Deployment of cutting edge financial technology and skills for national development.

### **3) TARGET CLIENTS**

- Banking & Financial Services Executives and Mid Level Managers;
- Senior and Mid-level Executives of private-sector business organizations;
- Policy-makers and management staff in government agencies and NGOs;
- Financial and economic reporters of local media houses.

### **4) STRATEGIES**

- Sponsorship by banks and financial institutions;
- Outreach through new/existing clients and contacts/referrals;
- Media/Public Relations Campaign;
- Sensitization of public and private sector decision-makers.

### **5) MARKET ENVIRONMENT**

Nigeria’s economy and indeed Africa is growing amidst limited skilled manpower. Quality training of personnel could only be done abroad with the attendant cost and risk of social and political differences in the two economies. WSI training program brings home the much desired high quality manpower-need at a cost-effective price and with localized approach. In other words, efforts to improve the regions capacity-needs will be tailored towards local environment by professionals who have been part of the solutions in other jurisdictions and who have wealth of experience in global finance and international business.

## 6) FEES (Subject to Confirmation)

- Hourly/Daily/Weekly Training;
- Client's Status/Size of Organization, Duration and Number of Attendees;
- Qualification of Resource-Persons and Period of Engagement.

## 7) COURSE PACKAGE & MATERIAL

- Breakfast/Lunch – Tea/Coffee/Sandwiches etc;
- Folders/Bags/Pen and other writings materials;
- CDs, Course Manual, Workbook, Reference Materials etc.

## 8) COURSE MODULES

**Module A:** Asset Management/Investment Advisory Concept and Practical Applications;  
**Module B:** Financial Sales Skills, Tools/Customer-Relationship Management (CRM);  
**Module C:** Pension Fund Management and Insurance Administration;  
**Module D:** Deal Packaging, Structuring and Underwriting in Commercial Banking;  
**Module E:** Financial Engineering, Modeling/Basic and Advanced Spreadsheet;  
**Module F:** Business Development, Strategic Planning/Execution for Start-up/SME;  
**Module G:** Contemporary Global Financial/Legal and Economic Issues - Impact on Domestic Business Operations.

## 9) INSTRUCTORS AND RESOURCE-PERSONS

Highly talented professionals with advanced credentials and 10-20 years (or more) of hands-on practical experience (locally and abroad) in financial services, accounting, asset management, insurance, retirement planning, corporate finance and international business

## 10) MODE OF DELIVERY

- Through customized corporate workshops/courses;
- Through standardized/open conferences/seminars;
- Through training sessions/orientation course for new/existing personnel;
- Organized and hosted in association with local partners and resource-persons.

## 11. STRATEGIC PARTNERS

- Sterling Partnership – Lagos-based Law Firm
- Distinct Consult Ltd – Lagos-based Consulting Co
- Imperial Asset Management Ltd– Lagos-based Broker/Dealer
- Business-In-Africa Events.Com – London-based Event Planning Company

## 12 COURSE-CONTENT

Course Code	Course Title	Description	Benefit to Attendees	Target – Who Should Attend?	Location*	Instructor**
WSI-01	Capital Budgeting and Investment decision in Banking, Insurance Company and Commercial Enterprises	Overview of capital budget Analyzing balance sheets, asset allocation	Acquire in-depth, and practical knowledge of key concepts and its application of budget/control in modern business environment	Mid-to-Senior level Executives in charge of budgeting, investment decision, branch operation, lending and business development	Lagos, Abuja, NY	Davidson, Femi Atonye Nancy*/TBD
WSI-02	Treasury and Risk management in financial institutions - banking, insurance and pension fund.	Define risk-reward metrics, differentiate between the concept and their practical application in various corporate settings	Knowing how best to deploy idle assets, and evaluate risks for optimum results in an organization	Senior level executives and key decision makers in banks, insurance companies, pension funds, investment firms and brokerage houses	Lagos, Abuja, NY	Femi, Davidson Atonye Wall Street Training USA
WSI-03	Private/Public financing for projects in businesses and various sectors	Review the role of various funding sources and growth drivers and impact on corporate balance sheet	Knowing where and how to mobilize financing. Mastering deal origination, underwriting, execution and monitoring process	Mid-to-Senior level executives in financial institutions, micro-finance banks, commercial enterprises, deal/project sponsors and investors.	Lagos, Abuja	Chamberlain, Davidson, Femi Nancy*/TBD
WSI-04	Capital Structuring, Business Valuation and Asset Pricing in business organizations	Overview and description of the various element of a the balance sheet and corporate financial statement	Knowing how much what is worth in a business and how best to utilize capital in enhancing your bottom-line.	Mid-to-Senior level Executives in financial institutions, brokerage houses and other business organizations.	Lagos, Abuja, NY	Davidson, Simon-Ogan, Wall Street Training USA*
WSI-05	Working capital management in business organizations	Analysis of capital structure and their functions in an organization	Practical knowledge of various elements of corporate capital and how best to manage them	Mid-to-Senior level executives in commercial organizations, SME and Micro-finance institutions	Lagos, Abuja	Davidson, Simon Ogan Atonye
WSI-06	Micro-finance and SME funding in various sectors – From feasibility studies, through business plan to securing funding/execution	Overview, analysis and role of micro-lending in Nigerian environment, business start-up and execution strategy	Knowing how to evaluate a project, fund a start-up, expand existing business, develop a strategic plan and drive your business model to fruition.	Key decision makers in SME, Micro-finance banks, business owners and prospective entrepreneurs	Lagos, Abuja, PH	Kunle, Chamberlain Femi, Simon-Ogan
WSI-07	Pension Fund and Employee benefit administration in public and private organizations and financial institutions	Definition and Role employee benefit scheme in modern corporate environment and society at large	Knowing how to set up and manage the right kind of employee pension and health insurance plan in an organization	Mid-to-Senior level executives in pension funds, human resource managers in corporate organizations, and business owners.	Lagos, Abuja	Femi, Chamberlain Nancy/TBD
WSI-08	Advanced financial modeling, investment banking, mergers and acquisitions and asset management	Fundamentals of Asset pricing model, deal analysis and decisioning. Structured products	Mastering the “art of the deal” and knowing when a deal makes sense, at what price and how to execute.	Senior level management in financial institutions and investment companies and brokerage houses	NY	Wall Street Training USA*
WSI-09	Investment Management, Financial Products and Financial Planning for individuals and businesses	Concept and practice of financial planning, products and diversification	Gain knowledge of theory, practice and techniques of modern financial planning in advanced markets	Mid-to-Senior level managers in brokerage houses, institutional and individual investors	Lagos, Abuja, PH	Chamberlain Simon-Ogan Nancy*/TBD
WSI-10	Modern Portfolio Theory, Advanced Fundamentals and Technical Analysis of Stocks and Bond. Capital Market Valuation and Investment Decision.	Conceptual overview and application of modern portfolio theory and real world application	How to analyze the securities market, role of various variables in market cycle. Applying global best practices to African scenario	Senior level managers and decision makers in financial institutions, and brokerage firms.	Lagos, NY	Wall Street Training USA* Chamberlain

\* Subject to confirmation

\*\* Subject to confirmation - not all the profile of instructors are provided below.

## **13. SHORT-LIST OF RESOURCE-PERSONS**



**CHAMBERLAIN S. PETERSIDE, Ph.D, CFM**

**FOCUS AREAS - ASSET MANAGEMENT, CORPORATE FINANCE,  
FINANCIAL PLANNING, STRATEGIC PLANNING,  
GLOBAL FINANCIAL MARKETS**

Chief Executive Officer of New Era Capital Corp/*MyCompleteness.com*® - New York City-based financial services group. Founder/Resource-Person of Wall Street Institute® (WSI). Previously worked as Certified Financial Manager (CFM)/Financial Advisor at Merrill Lynch Global Private Client Group and HSBC Brokerage, in New York City. Author of over 60 published articles on financial policy/economic development and two books: *Wealth Effect Part 1 - Africa in Midst of Global Economic Transformation (2007)*. *Wealth Effect Part 2 – Focus on Economic Reform and Sustainable Development in Nigeria (2008)*.

He graduated with a Masters degree in Finance and Ph.D in Economics from Friendship University, Moscow. Earned nearly 20 years of diverse experience in international Business Development, Management Consulting and Investment Advisory activities in Africa, Europe and the United States.

While on Wall Street, Chamberlain has been focused on Investment Advisory, Wealth Management, Financial Planning and Corporate Finance Transactions on behalf of individual investors and institutions. Thus far, he has participated in originating, negotiating, conducting due diligence and structuring several international transactions as well as involved in projects in the oil/gas and maritime industries as well as healthcare, hospitality, real estate, telecommunication and biotechnology sectors both in the US and abroad.

He is a frequent speaker/presenter at industry events and in the media, including CNN (In The Money) and Russian Cable TV Network (RTN, RTVi). Was honored In June 2007 by 110<sup>th</sup> US Congress with a Congressional Citation for remarkable professional achievements and unrelenting effort. Between 2001-2003, served as Adjunct Associate Professor of Finance and Business Management at ASA Institute of Business Management & Advanced Technology in New York.



**FEMI O. ODULANA, FCA and MAAA**

**FOCUS AREAS – PENSION FUNDS, INSURANCE & RISK MANAGEMENT,  
EMPLOYEE BENEFITS MODEL, SME AND MICRO-FINANCE**

Femi is CEO and Chief Actuary of FeMilano Investment Group, USA and Senior Advisor at the New Era Capital Corporation in New York City. He is a Fellow of the Conference of Consulting Actuaries (FCA), a Member of the American Academy of Actuaries (MAAA). His areas of expertise include: valuation, funding and administration of pension funds; management strategies in insurance, healthcare and retirement benefits. He has over twenty years of valuable experience and has held various senior management and consulting positions at major multinational corporations in the U.S., including AT&T, Aon Consulting, Blue Cross Blue Shield of Delaware, HMO of Delaware, and Allstate Insurance Company.

He is the author of a published book by the Chartered Institute of Bankers of Nigeria - *Pension Reforms in Nigeria: A Guide to Implementation and Operations of Pension Reform Act 2004*. He is has also widely published on pension issues and financing of small and medium size enterprises (SMEs), specifically in the agricultural and agro-business sector. He is a regular speaker and instructor at industry events at the Chartered Institute of Bankers of Nigeria.

Femi is a graduate of the Actuarial Science program at the University of Nebraska, Lincoln (USA). While doing postgraduate work in Mathematical Statistics at the same university, he concurrently taught Calculus in the Mathematics Department. He is also an alumnus of Methodist Boys' High School in Lagos.



**DAOPUYE SIMON-OGAN, BBA, CPA, MBA**

**FOCUS AREAS – FINANCIAL ACCOUNTING, INTERNAL AUDIT AND CONTROLS, FINANCIAL PLANNING**

Daopuye – A US-based Certified Public Accountant (CPA) for over eighteen years. He has a Bachelors degree in Finance/Banking and MBA from University of District of Columbia, USA. His accounting career spans over 22 years in various sectors. He started off his career at Riggs National bank, and has held key managerial position within most companies he had worked with. He worked as senior accountant for Maimonedes Medical Center for seven years.

He also was a Manager/Interim Chief Financial Officer for National Hemophilia for another five years, and as temporarily controller for X+1, and as manager for IAHD, he had helped those companies in strategic management and financial operations. Simon has successfully run his own private financial consulting/tax services business for over fifteen years. He also manages rental real estate properties in New York City.



**DAVIDSON DIKE, B.Sc, MBA, MNIM, ACA**

**FOCUS AREAS – FINANCIAL ACCOUNTING & CONTROLS, CORPORATE FINANCE, COST AND MANAGEMENT ACCOUNTING, CAPITAL BUDGETING**

Davidson is a highly experienced and talented financial professional with nearly 20 years of hands-on involvement in various aspects of financial practice. He is key resource-person in the Wall Street Institute that brings a critical skill-set and knowledge of the Nigerian financial and accounting environment. He has recently written a book captioned – *Strategic Financial Management*, that seeks to deliver theoretical concept as well as practical knowledge and workings of the financial industry in Nigeria.

He graduated with a Bachelors degree in Accounting from University of Calabar and MBA. He is a qualified accountant (Associate member of the Nigerian Institute of Chartered Accountants – ICAN) and full member of the Nigerian institute of Management – NIM). Davidson is also a member of the Chartered Institute of Stockbrokers (CIS).

Davidson has had a diverse working experience in the finance/accounting field that encompassed several stints in Reckitt & Colman (Nig) Ltd, David Oleneme & Co (Chartered Accountants) and Primus (Nig) Ltd, where his responsibilities included, budget/costing, management accounting and preparation/review of final accounts. He currently works with Arik Airline as an Accountant.



**KUNLE BALOGUN, B.Sc, MBA**

**FOCUS AREAS – FINANCIAL ANALYSIS, FINANCIAL MODELING/SPREADSHEET, SME STRATEGY, FINANCIAL PRODUCT SALES & MARKETING**

Kunle is a financial analyst in the international practice of New Era Capital Corp. He focuses on projects within Nigeria and West African region. His responsibilities involve playing crucial role in our deal-origination and execution effort on the ground. He supports the firm in analyzing projects, assists in conducting feasibility studies, structuring Strategic Business Plans (SBP) and developing financial models/spreadsheets for executing projects. His experience in the low-to-mid market segment of the banking industry will be a tremendous asset for delivering practical knowledge to employees and decision makers in diverse sectors.

Kunle brings to Wall Street Institute a wealth of experience in Financial Analysis, Small Business Lending, and Commercial Banking, spanning nearly a decade. Prior to his current role, Kunle was Senior Bank Executive with Societe Generale Bank (Ltd) in Nigeria, where his primary responsibilities was working with small business owners in analyzing business proposals and structuring loan transactions and other financial products to meet specific needs. Kunle earned a Bachelors degree in Banking and Finance and holds both a Masters degree in Finance and MBA from Ado Ekiti University. He has excellent working knowledge of financial technology applications and modeling tools.

**ATONYE WILCOX, MBA, CPA**

**FOCUS AREAS – FINANCIAL ACCOUNTING, INTERNAL AUDIT AND CONTROLS, FINANCIAL ANALYSIS & PLANNING**

Over the last fifteen years, Ms. Wilcox has held senior financial positions in various sectors ranging from financial services, real estate, telecommunication to public accounting firms within the United States and Nigeria. Ms. Wilcox was a partner in Puglisi & Associates, - US-based certified public accounting firm, where her services as a tax/financial advisor was key in assisting both individual and corporate clients carry out their financial operations with ease.

Atonye graduated with a Bachelors degree in Accounting from Strayer University, Washington, DC and earned an MBA in International Finance from University of Maryland, USA.

In December 2005, Ms. Wilcox joined Nigerian-based Telecommunication Company; MTS First wireless Ltd as its manager for financial operations. Her tenure at MTS resulted in putting in place controls, policies and procedures for the company's financial processes, which are currently still being utilized. Her service was key in completing 4 years financial audit within 1-year period and her negotiating skills translated into millions of Naira savings for the company.

Ms. Wilcox is currently the financial controller and acting administrative manager for CR Services, Ltd (subsidiary of Credit Registry, USA - the pioneer credit bureau company in Nigeria). Her responsibilities entail setting standards by putting in place operating controls and processes that will ensure continued growth and financial success of the company.