We leverage insights from our 870,000+ member community from the past 16 years to provide the most relevant training for investment banking professionals.

The largest online community focused on careers in finance

200,000,000+ Visits

Thousands of IB professionals use our training material

100,000+ Enrolled

Cherry-picked instructors from top investment banks

45+ BB, MM and EB Faculty
Professionals From All the Top Banks Use WSO

Goldman Sachs  J.P.Morgan  Bank of America  citi

LAZARD  Morgan Stanley  Harris Williams

MACQUARIE  NOMURA  BMO  Rothschild & Co

MOELIS  PiperJaffray  Evercore  Scotiabank
Investment Banking Recruiting Challenges

Unproven talent + out-of-touch instructors + old training methods = weak analyst classes

- Recruiting interns **18 – 32 months** before FT start date
- Incredibly difficult to find trainers with the right skills and desire to teach
- Shorter attention spans among new recruits require gamification of training
Standardized financial modeling training is not enough.

Intensive, realistic cases with detailed models built on real-life companies

Developed and delivered by top IB faculty with deal experience relevant to your niche

Courses tailored for both traditional and non-traditional hires
Why Wall Street Oasis?

We leverage the largest finance community to bring together the best faculty to develop and deliver world-class IB training.

Cherry-picked instructors from top banks (20,000+ candidate pool)

Gamified approach to increase engagement with the new hires

Iterative feedback from IB community (50,000+), and senior IB professionals (423+) on staff
Training Customized to Your Bank

We ensure our training meets your specific needs.

Integrate your current training practices (if any). Live virtual, in-office, or full self-study online options.

Our faculty can train using your models, pitch decks, and other templates.

Programs customizable to the background of trainees.
Wall Street Oasis’ Investment Banking Faculty

Below are some of our specialized IB faculty who help us continuously develop and deliver best-in-class IB training.

**Craig Thompson**
Investment Banking Instructor

Craig was an Investment Banking Associate at Goldman Sachs. He then worked as a Private Equity Associate at KKR. Craig has an MBA from The Wharton School and a Bachelor’s Degree in Mathematics from Middlebury College.

**Tim Schlidt**
Investment Banking Instructor

Tim was an Investment Banking Analyst at Greenhill & Co & JP Morgan. He then became a Private Equity Associate with Madison Dearborn Partners. Tim has a Bachelors of Business Administration from University of Wisconsin-Madison.

**Levi Malik**
Investment Banking Instructor

Levi was an Investment Banking Analyst at Morgan Stanley. He then worked as Equity Associate at Hellman & Friedman. Levi has an MBA from Stanford University Graduate School of Business, and a Bachelor of Arts from Princeton University.

**Josh Pupkin**
Investment Banking Instructor

Josh was an Investment Banking Analyst at Barclays. He then worked as a Private Equity Associate at Neuberger Berman. Josh has an MBA from Duke University - The Fuqua School of Business. Currently, Josh is a VP at AlixPartners, a financial advisory and global consulting firm focusing on turnarounds and restructuring.
Wall Street Oasis’ Investment Banking Faculty

Below are some of our specialized IB faculty who help us continuously develop and deliver best-in-class IB training.

**Emma Teach**  
Investment Banking Instructor

Emma was an Investment Banking Analyst at Citi before moving to L Catterton as a Private Equity Associate. Emma is currently doing an MBA from the Harvard Business School, and has a Bachelor of Arts, Economics from Hamilton College.

**Nicolas Yepes**  
Investment Banking Instructor

Nicolas was an Investment Banking Associate at Scotiabank, and an Investment Banking Analyst at Morgan Stanley. He then became a VP at Creation Investments Capital Management. Nicholas has an MBA from Chicago Booth, and a Bachelor of Arts from Hamilton College.

**Pedro Silva**  
Investment Banking Instructor

Pedro previously worked as an Investment Banking Analyst at JP Morgan for over two years and as a Vice President at EIG Global Energy Partners for five years. He holds a Bachelor of Arts in Economics from Rice University.

**Jake Goldstein**  
Investment Banking Instructor

Jake worked at Bank of America as an Investment Banking Analyst before transitioning to Melvin Capital as an Analyst. He currently is the CEO of the startup he founded, Bold Numbers, Inc. He holds a Bachelor of Science from Yale University.
Appendix II

Sample Program Overview
Investment Banking Foundations - Program Overview

Prep work
- Accounting Basics
- Excel Basics
- PowerPoint Basics
- Valuation Theory

Productivity
- Excel Modeling
- Excel Capstone
- Advanced PowerPoint
- Benchmarking

Basics
- Financial Statement Modeling (FSM)
- DCF Modeling
- Spreading Comps

Mastery
- M&A Modeling
- LBO Model
- Advanced LBO Modeling
- Advanced Accounting
- Industry Specific Training
Prep work prior to training helps ensure baseline knowledge to access the curriculum.

**Accounting Basics**

**The Income Statement**
- Revenue, Revenue Recognition, COGS & Gross Profit, SGA, and R&D
- D&A, Stock-Based Comp & Other Opex
- NI, EBIT, EBITDA & Income Statement

**The Balance Sheet**
- Introduction to Assets
- Introduction to Liabilities & Equity

**The Cash Flow Statement**
- Cash From Operations
- Cash From Investing
- Cash From Financing

**Financial Statement Analysis, Working Capital & Other Considerations**
- Non-GAAP measures, and Earning Management

**Excel Basics**

**Navigation**
- Grouping, and Hiding
- The Ribbon
- Formula Bar
- Worksheets, and View/Zoom
- Navigating Menus

**Efficiency Foundation**
- Grouping & Hiding
- Rows & Columns
- Fill Right & Down
- Paste Special
- Ctrl vs. Alt
- Quick Access Toolbar

**Excel Shortcuts**
- Downloadable Excel Shortcut Cheat Sheet

**PowerPoint Basics**

**PowerPoint Interface**
- PPT Toolbar
- Navigating View Modes
- Key Shortcuts

**Objects & Lines**
- Basic & Advanced Object Formatting
- Adjusting Text in Objects
- Insert & Adjust Lines
- Grouping & Layering Shapes
- Ninja Lines

**PowerPoint Tables**
- Insert Tables & Modifying Rows/Columns
- Shading/Adding Lines
- Formatting Text in Tables
- Advanced Formatting
Investment Banking Foundations - Program Overview

**Excel Modeling**
- Fundamentals Concepts
  - Shortcuts
  - Hotkeys
  - Hard-Coding Formulas
- View & Print
  - Show & Zoom
  - Freeze and Split Panes
  - Print and Page Layout
- Math Functions
  - Formulas
  - Errors
  - Advanced Math Functions
  - Anchoring
- Date & Text Functions
  - Dates in Excel
  - Dynamic Text

**Excel Capstone**
- Lookup & Financial Functions
  - Vlookup and Hlookup
  - Index + Match and Data Validation
- Scenarios & Data Tables
  - Various Scenarios
  - Setting up Data Tables
  - Naming Cells and Formula Auditing
- Sorting, Filtering & Pivot Tables
  - Custom Sort and Horizontal Data Sets
  - Various Filtering Options
  - Visually Analysis Data with Pivot Tables
- Excel Charts
  - Inserting & Adjusting Charts
  - Combo Charts
  - Trendlines and Regression
- Capstone Assignment
  - Apply Concepts From The Training to Recreate Excel Tables & Charts

**Advanced PowerPoint**
- Graphics
  - Picture Formatting
  - Custom Bullets
- Diagrams
  - Common Diagrams Used in PE
- Graphs
  - Pie, Bar, and Line Charts
  - Football Fields
- The PowerPoint Interface
  - Navigating the Slide Master
- Tips & Tricks
  - Version Control
  - Tracking & Completion of Comments
- Storyboarding
  - Identify the main theme
  - Slide structure
  - Delegate responsibilities for components
Financial Statement Modeling

Income Statement
- Historical Income Statement, Drivers & Projections

Working Capital, PP&E, and Intangibles
- Historical BS, Receivables, Inventories, Prepaid Expenses, Payables & Accrued Liabilities

The Cash Flow Statement
- Cash Flow From Operations & Investing, Equity Schedule, Calculating Dividends & Stockholder Equity

Debt & Interest Schedule
- Cash from Debt Paydown, Long Term Debt, Revolver
- Interest & Circularity

Finishing The Model
- Historical Basic Shares & Dilutive Securities, EPS Calculation, Share Repurchase, and Option Proceeds
- Scenario and Sensitivity Analysis

DCF Modeling

Enterprise Value and Equity Value
- Moving from Equity Value to Enterprise Value
- What Effects EV

DCF Fundamentals
- Unlevered vs. Levered FCF
- Calculating NWC
- Sample Ratios and Projection Drivers
- Locating relevant information
- Terminal Value

WACC Overview
- Intro to CAPM
- Unlevered Beta Calculation

NPV of Future Cash Flows
- Deriving Share Price from the NPV of Future Cash Flows
- Fully Diluted Shares Outstanding
- Impact from Options & Warrants
- Sensitivity Analysis

Relative Valuation

Enterprise Value & Equity Value
- What Affects Enterprise Value?
- Value Multiples
- Structure Independence
- DCF vs Comps

Trading Comps Setup & Benchmarking
- P&L Terminology and Item Impacts, Commonly Used EV Multiples
- Selecting a Universe of Comparables
- Benchmarking & Determining the Valuation Through Comparable Analysis
- FDSO

Precedent Transactions
- Screening for & Selecting the Universe of Precedent Transactions
- Synergies
- Deal-Specific Dynamics
- Football Field
- Non-GAAP Adjustments
## Investment Banking Foundations - Program Overview

### Advanced Accounting

- **Deferred Taxes**
  - Intro to Deferred Taxes
  - Deferred Tax Liabilities and Assets
  - Book vs. Tax Basis

- **Net Operating Losses (NOLs)**
  - NOLs and Valuation Allowance

- **Stock-Based Compensation**
  - Stock Options
  - Restricted Stock

- **Intercompany Investments**
  - Types of Investments
  - Equity Method and NCI

- **Lease Accounting**
  - US GAAP vs IFRS
  - ROU and Lease Liabilities
  - Liability Roll-Forward

- **Debt Accounting**
  - PIK, OID, Capitalized Interest, and OIP

### M&A Modeling

- **M&A Intro**
  - The Big Picture
  - M&A Players and Process
  - Types of M&A Transactions
  - Pitchbooks

- **Buyside Processes**
  - Stages of Buyside Process
  - Agreement on Price, Transaction Closing

- **Sellsive Processes**
  - Stages of a Sellsive Process
  - Assessment and Process Set up
  - Buyer Meetings and Diligence
  - Agreement on Price, Transaction Closing

- **M&A Model**
  - Model Setup
  - Simplified Analysis
  - Detailed Analysis
  - Accretion/Dilution Analysis

### LBO Model

- **Valuation and Transaction Assumptions**
  - Enterprise Value to Equity Value
  - Adjusted EBITDA
  - Acquisition Multiple

- **Sources and Uses**
  - Debt Tranche Overview
  - Leverage Ratios
  - Revolver, Term Loans, Mezzanine Financing, and Preferred Stock

- **P&L Projections & LBO Adjustments**
  - Key Changes to the P&L and Linking the Income and Cash Flow Statements

- **Debt Schedule**
  - Revolver, Tranches, and Interest Expense
  - Financing Fees & OID
  - Circularity

- **Balance Sheet and Adjustments**
  - Linking CAs and CLs, PP&E, Intangibles, Goodwill, Deferred Financing Fees
Appendix III

Sample Agendas
# IB Intern Program – 1 Week Sample Agenda

<table>
<thead>
<tr>
<th>Week 1</th>
<th>Day 1</th>
<th>Day 2</th>
<th>Day 3</th>
<th>Day 4</th>
<th>Day 5</th>
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<tbody>
<tr>
<td>Excel Modeling</td>
<td>Accounting Basics</td>
<td>Relative Valuation</td>
<td>DCF Modeling</td>
<td>LBO Modeling</td>
<td>Advanced Concepts</td>
</tr>
<tr>
<td>Advanced PowerPoint</td>
<td>FSM</td>
<td>DCF Modeling</td>
<td>M&amp;A Modeling</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Some of the topics covered

### Excel Modeling:
- Navigation Shortcuts
- Efficiency Foundation
- Graphs and Tables

### Advanced PowerPoint:
- Objects and Lines
- Graphics and Diagrams
- Storyboarding

### FSM:
- Modeling best practices
- 3-statement modeling
- Debt Schedule

### DCF Modeling:
- Normalizing financials
- WACC
- Football field

### Relative Valuation:
- Valuation Theory
- Intrinsic vs Relative Value
- Enterprise vs Equity Value
- Normalizing Financials
- Trading Comps
- Transaction Comps
- Benchmarking

### M&A Modeling:
- Buyside Process
- Sellsde Process
- Accretion/Dilution
- Sensitivity Analysis

### LBO Modeling:
- Short and long-form LBO
- Waterfall modeling
- NOL
# IB Analyst Program – 2 Week Sample Agenda

<table>
<thead>
<tr>
<th>Week 1</th>
<th>Week 2</th>
<th>Week 3 (Optional)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Day 1</strong></td>
<td><strong>Day 2</strong></td>
<td><strong>Day 3</strong></td>
</tr>
<tr>
<td>Excel Modeling</td>
<td>Financial Statement Modeling (FSM)</td>
<td>Advanced FSM and Accounting</td>
</tr>
<tr>
<td>Advanced PowerPoint</td>
<td>Valuation Theory and DCF Modeling</td>
<td>Advanced LBO Modeling</td>
</tr>
<tr>
<td><strong>Day 5</strong></td>
<td><strong>Day 4</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Live Deal Simulation centered on Client Deal</td>
</tr>
</tbody>
</table>

**Some of the topics covered**

**FSM:**
- Modeling best practices
- 3-statement modeling
- Debt Schedule

**DCF Modeling:**
- Normalizing financials
- Precedent vs trading comps

**Spreading Comps:**
- Valuation Theory
- Intrinsic vs Relative Value
- Enterprise vs Equity Value
- Normalizing Financials
- Trading Comps
- Transaction Comps

**M&A Modeling:**
- Buyside Process
- Sellside Process
- Buyer Meeting and Diligence
- Transaction Assumptions
- Accretion/Dilution
- Sensitivity Analysis

**Advanced LBO Modeling:**
- Short and long form LBO
- Waterfall modeling
- NOL
- Purchase Price Accounting
- Dividend Recap
- Add-on Acquisition Build
IB Analyst Program – 3 Day Sample Agenda

<table>
<thead>
<tr>
<th>Prep Work</th>
<th>Day 1</th>
<th>Day 2</th>
<th>Day 3</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Week 1</strong></td>
<td>Excel Basics</td>
<td>Financial Statement Modeling (FSM)</td>
<td>DCF Modeling</td>
</tr>
<tr>
<td>PPT Basics</td>
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<td></td>
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</tr>
</tbody>
</table>

Some of the topics covered

**Excel Basics:**
- Navigation
- Efficiency Foundation
- Excel Shortcuts
- Fundamental Concepts
- View and Print
- Formulas and Functions
- Charts and Tables

**FSM:**
- Incomes Statement
- Working Capital and PPE
- Intangibles
- Cash Flow Statement
- Debt and Interest Schedules
- Basic and Dilutive EPS
- Scenario Analysis

**DCF Modeling:**
- Enterprise Value
- Equity Value
- DCF Fundamentals
- Levered vs Unlevered FCF
- WACC and CAPM
- Net Present Value
- Impact of Options + Warrants

**Relative Valuation:**
- Valuation Theory
- Intrinsic vs Relative Value
- Enterprise vs Equity Value
- Normalizing Financials
- Trading Comps
- Transaction Comps
- Benchmarking
Appendix I

Case Studies
3-Day Analyst Training Program

Client Needs

A boutique investment bank in SF wanted to train four incoming analysts out of undergrad.

- The bank primarily focused on tech M&A deals and was looking for a program that would provide their new analysts with foundational financial modeling skills and requested we incorporate firm-specific retention models.
- They were looking to standardize their analyst onboarding and training process. They also wanted the course materials + prep work to be available after the live sessions for the analysts to reference.

Approach

3-Day live virtual training program covering financial modeling and firm-specific retention models.

- Assigned online prep work prior to live virtual sessions allowing training to be fully prepared and engaged.
- We connected with senior management prior to the sessions to discuss the SaaS retention models, and our core financial modeling courses (Excel, Financial Statement Modeling, Valuation) that we delivered.
- Provided senior employees with access to the admin dashboard to track employee progress. Trainees were given access to the materials after the live sessions for reference on the job.

Impact

- Shortened/virtual program kept training costs, resource tie-up, and disruption to a minimum.
- After the private training was completed, the firm renewed for their next class of Analysts.
- Helped the small bank to start critical data collection on new employee performance, allowing them to benchmark, identify and modify needs for continuing education.
5-Day Intern Training Program

Client Needs
An **MM investment bank** in NYC wanted to train 12 incoming interns that were joining the team for the summer.
- Due to suboptimal learning environments during Covid, the firm recognized there would be a **large skill gap** across their intern class.
- The firm was looking to **provide an in-office training program** for interns to get exposure early on and develop skills that would allow them to take part in impactful work.

Approach
**5-Day in-office training** program that covered both foundational modeling & productivity skills.
- Assigned **online prep work** prior to the internship start date allowing trainees to be fully prepared and engaged with a baseline knowledge level.
- Started the training with **productivity-based courses** (Excel & PPT) to ensure trainees were proficient in the tools they will be spending most of their time in.
- Provided senior employees with access to the **admin dashboard** to track employee progress & set due dates on the prep work while reviewing assessment scores on the content covered in the live sessions.

Impact
- Interns gained exposure to various types of financial modeling & valuation methods and came out of the training with skills that allowed them to be **efficient in their day-to-day tasks**.
- Associates & Vice Presidents benefited from a more proficient intern class. All interns were able to **efficiently prepare** pitch decks and valuation models within a few weeks, instead of a few months.
- Once the sessions were completed, the client immediately **renewed for the following year** to onboard their next class of interns. We were also asked to return at the end of the summer to ramp up incoming full-time analysts.
10-Day Analyst + Associate Training Program

Client Needs
An MM investment bank in Chicago was interested in a customized training program for 6 new analysts & 5 new associates on financial modeling & valuation.

- Tailored to the specific industry the bank mainly focused on (Industrials)
- Trainees were both newly hired analysts & associates that were just recently promoted.
- Instructor needed to manage varying levels of experience to ensure all trainees would benefit.

Approach
10-Day in-office training program covering foundational and advanced modeling

- Week 1 was for new analysts only and covered Excel Modeling, Advanced PowerPoint, Financial Statement Modeling (FSM), DCF Modeling, and Valuation theory.
- Week 2 was for analysts and associates and covered Advanced LBO Modeling, M&A Modeling, and Advanced Financial Statement & Valuation Modeling.
- Customized the training based on two of the firm's successful M&A mandates.

Impact
- Received outstanding reviews in our follow-up survey that was delivered to all 11 trainees after the program was completed. All of them scored over 85% on the post-session assessments.
- Given the success of the customized sessions, we were re-engaged to deliver a custom training session covering the advanced FSM builds to all current analysts & associates.
- Analysts that were hired out of undergrad performed better on modeling assessments when benchmarked to their previous class.
Sample Materials
PowerPoint for Finance

Using Lines & Shapes to Create Connected Diagrams

Lesson 3.10

Hierarchy Diagrams

- Using a connector, a line with connection points at each end that stays connected to the shapes you attach it to, you can show hierarchies and other important relationships between objects. These lines come in straight, angled or curved and can be connected on specific “dots” that appear on each shape.

Navigating the Slide Master

Lesson 2.3

Slide Master View

- The slide master represents a hierarchy of slides that stores information about the slide layouts of a presentation.
  - This view is essentially the base “template” for the slide deck and ensures consistency across all similar slides.
  - This function is very helpful for setting up basic slides that you’ll use over and over again.
  - Some helpful shortcuts include:
    - ALT + W + M to enter Slide Master Mode and ALT + M + C to close Slide Master Mode.
    - ALT + H + Q to reset the slide layout.
Financial Statement Modeling

Financial Statement Modeling: Refresher

Financial Models: What end result are we working towards?

The Three Financial Statements

Income Statement
- Net Income
- D&A

Cash Flow Statement
- Changes in NWC
- Capex

Balance Sheet
- Net Debt
- Equity

1. Financial Statements are interconnected
2. Creating a three statement operating model is a critical skill to master for countless IBD exercises (Valuation, M&A, ALF, DCM, ECM, Business Plans, etc.) but also PE, Equity Research, VC, Business Development and Consulting!
DCF Modeling

Valuation Wrap-Up

Putting It All Together

Sample Football Field Across Valuation Methodologies

DCF Intro

Example: EV and Equity Value based on LFCF

On the other hand, the PV of a Levered DCF is Equity Value, so add debt/other financial obligations and subtract excess cash/non-core assets to derive Enterprise Value.

Use the assumptions below to calculate EV and Equity Value:

- Assume current date is 12/31/2019
- All future cash flows come in 12/31 of each following year
- Levered Free Cash Flows:
  - 2020: $50mn
  - 2021: $75mn
  - 2022: $110mn
  - 2023: $250mn
  - 2024: $490mn
- Cost of Equity: 15%
- PV of Terminal Value: $2.5bn
- Debt of $1bn; $250mn of NCI
- Cash: $355mn
Valuation Modeling

Trading Comps Setup

Module 18B

Locating Relevant Financial Information for the Comp Set

Key info. analysts used to prepare trading comps (both historical and forward-looking) can be sourced from most recent 10-K, 10-Q, 8-K, press releases, equity research, etc.

Income Statement Data
- Sales
- Gross Profit
- EBITDA
- EBIT
- Net Income and EPS

Balance Sheet Data
- Cash Balances
- Debt Balance
- Shareholder’s Equity
- Basic Shares
- Capital Expenditures

Cash Flow Statement Data
- Depreciation & Amortization

Share Information

Valuation – The Big Picture

Module 16

The Home Purchase Example

You’ll move back and forth between Equity Value and Enterprise Value all the time when analyzing companies or assets. Take the example below for context:

- You are purchasing a $1 million house, 20% funded with your own money (the "Equity") and 80% funded with a mortgage (the "Debt")
- The seller of the house left a small tractor in the yard. As you don’t have a need for the tractor, you will sell it after closing on the house purchase
- The housing structure and land represent the core of the housing asset. The tractor represents a non-core asset that mortgage lenders aren’t entitled to

Equity Value
- Equity Value represents the portion of the home’s purchase price that wasn’t funded by the mortgage (i.e. your $200k down payment)
- Includes any potential value from the sale of non-core asset (tractor)

Enterprise Value
- Enterprise Value represents the value of the core parts of the house to both you (the equity investor) and the mortgage lender (i.e. $1mm)
- Includes value of the mortgage, but excludes non-core items like the tractor (similar to excess cash for a company)
M&A Modeling

Calculating Accretion/Dilution

- To calculate accretion/dilution, you follow similar steps to the prior example, though this time you have stripped out the relevant units and reduced shares as relevant.

M&A Players and the Creation of M&A Processes

Sell-side Engagements

- M&A sell-side auction (~3-5 months)

1. Pitching and mandate
   - Exit considerations, likely buyers, value-add of firm (~1 month)
2. Pre-marketing
   - Teaser preparation, first touchpoint with potential buyers (~1-2 months)
3. Auction Round 1
   - Info Memo, summary CVDDS released after NDA (~1 month)
4. Auction Round 2
   - Management Presentation, full CVDDS released, Q&A (~1 month)
5. Signing
   - Binding offers, SPA negotiations, final agreements (~2 weeks)
LBO Modeling

Sources and Uses: The Theory

Overview of Sources

Sources of Cash in an Acquisition

- Excess Cash
  - Cash on Balance Sheet - Minimum Cash
    - Some associates will list Balance Sheet Cash as a Source and Minimum Cash as a Use.
    - The impact is the same
    - Minimum cash tends to be ~2 months of S&A expense or 4% of annual revenue, though this can vary based on company needs and industry dynamics

- Debt
  - Equity
    - Sponsor Equity
    - Management Rollover
    - Minimum of 30% through growth in deal multiples has pushed actuarics higher over the years

LBO: The Big Picture

Debt Paydown and Returns

Analogy: Buying a rental home that generates rental income to pay down your mortgage

<table>
<thead>
<tr>
<th></th>
<th>T = 0</th>
<th>T = 1</th>
<th>% Return on Equity</th>
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<tbody>
<tr>
<td>Home</td>
<td>$200k</td>
<td>$250k</td>
<td></td>
</tr>
<tr>
<td>Equity</td>
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</tr>
<tr>
<td>Mortgage</td>
<td>$100k</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rental Income</td>
<td>$50k</td>
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</tbody>
</table>

Cash flows generated can further magnify returns by either accruing cash or paying down debt.
Appendix V

Beyond The Classroom
Progress Dashboard

Track your team’s progress

- Track time spent in the course
- Track % of lessons completed
- Track % of quiz questions answered correctly
- Assign due dates
- Invite new employees/interns
- Benchmark to older employees
Post Training Course Access

Lifetime online course access to encourage learning and review beyond the classroom.
Next Steps

Book a Call at https://calendly.com/wallstreetoasis/10-min-wso-training-li

or

Email us at Licenses@WallStreetOasis.com