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COURSE BROCHURE

Advanced English for Finance and Banking Professionals Course

31 May – 11 June 2027
Rome

Advanced English for Finance and Banking Professionals Course

Ref: 493_18152 **Date:** 31 May – 11 June 2027 **Location:** Rome **Fees:** 11100 GBP

English for Finance and Banking Professionals is a 2-week advanced training course for finance officers, accountants, bankers, analysts and treasury staff who work in English as a second language, and each participant leaves with a finance English portfolio. Finance teams now report, borrow and invest across borders in English, so imprecise wording can distort figures and weaken credibility. Jupiter Prime Training runs this course on English for finance and banking professionals.

Why English for Finance and Banking Professionals Matters Now

Three forces have raised the stakes of English for finance and banking professionals. Group reporting, external audit and investor relations increasingly run in English, even where daily work happens in another language. Lenders, auditors and analysts expect precise explanations of variances, covenants and risks, and a vague phrase can be read as uncertainty or concealment. Finance teams also work remotely with counterparties on calls and in shared documents, where language errors are harder to repair. Organisations whose finance staff explain numbers fluently win trust and close negotiations faster. The course targets level C1 of the Common European Framework of Reference for Languages CEFR and plain language principles from ISO 24495-1.

Who Gains Most from English for Finance and Banking Professionals

- Financial reporting staff who prepare statements, variance commentary and management packs in English
- Credit and relationship staff who discuss facilities, covenants and repayment with clients
- Treasury and investment staff who report cash positions, yields and funding needs
- Internal control and audit liaison staff who answer auditor queries and document processes
- Financial planning analysts who present budgets, forecasts and results to committees

Finance departments that send reporting, treasury and credit staff together gain most, because they can agree a shared glossary and standard commentary phrasing on return.

English for Finance and Banking Professionals Capabilities

Participants move from translating finance thoughts into English to speaking and writing about figures directly, accurately and with confidence.

- Apply finance vocabulary for statements, budgets, credit and investment accurately — reporting and lending decisions
- Build variance explanations and management commentary in clear English — non-finance managers and boards
- Specify requests, approvals and audit responses in precise finance emails — auditors and controllers
- Communicate financial results in spoken presentations with clear signposting — executive committees and investors
- Test answers to analyst, auditor and committee questions under pressure — external scrutiny
- Calibrate negotiation language for rates, fees and terms — clients, lenders and suppliers

Key English for Finance and Banking Professionals Terms

- CEFR C1 — The advanced level of the Common European Framework of Reference for Languages, describing fluent, flexible language use in professional settings.
- Variance commentary — Written or spoken explanation of differences between actual results and budget or forecast, with their causes.
- Covenant — A condition in a loan agreement, such as a ratio limit, that the borrower agrees to maintain.
- Hedging language — Words such as likely, broadly or subject to that signal uncertainty and avoid overstating a forecast or claim.
- Management commentary — Narrative text accompanying financial figures that explains performance, drivers and outlook to readers.
- Collocation — Words that naturally occur together, such as post a loss or raise capital, which make finance English sound fluent.

English for Finance and Banking Professionals Day by Day

Day 1: English as the Working Language of Finance

- CEFR C1 Descriptors for Finance Communication — Setting Personal Language Targets
- Language Needs Audit of Daily Finance Tasks — Prioritising Weak Skills
- Register in Finance English From Formal to Conversational — Choosing Tone
- Common Errors of Second-Language Finance Speakers — Targeted Correction
- Personal Finance Vocabulary Log — Building Recall Across the Course

Day 2: Vocabulary of Financial Statements

- Income Statement Terms and Collocations — Describing Revenue, Cost and Profit
- Balance Sheet Language of Assets, Liabilities and Equity — Explaining Position
- Cash Flow Statement Phrasing — Operating, Investing and Financing Movements
- Notes and Accounting Policy Wording — Reading Disclosures Accurately
- Ratio Language for Margins, Liquidity and Gearing — Comparing Performance

Day 3: Describing Figures, Trends and Variances

- Trend Verbs and Adverbs of Degree — Precise Movement Descriptions
- Number Pronunciation for Decimals, Percentages and Large Figures — Clarity
- Variance Explanation Structures — Actual Versus Budget and Forecast
- Cause and Effect Language — Linking Drivers to Financial Results
- Hedging and Certainty Expressions — Forecasts Without Overstatement

Day 4: Language of Budgets, Credit and Investment

- Budgeting and Forecasting Terminology — Planning Cycle Conversations
- Credit Assessment Vocabulary of Collateral, Covenants and Default — Lending Talk
- Investment and Portfolio Terms — Yield, Return and Risk Appetite
- Treasury and Liquidity Expressions — Funding and Cash Position Updates
- Banking Product Explanations for Clients — Accounts, Loans and Facilities

Day 5: Writing Finance Emails and Reports

- Finance Email Structures for Requests, Approvals and Reminders — Faster Replies
- Month-End and Quarter-End Status Updates — Concise Progress Messages
- Management Commentary Paragraphs — Explaining Results to Non-Finance Readers
- Plain Language Principles of ISO 24495-1 for Finance Text — Readability
- Grammar Accuracy in Tenses, Articles and Prepositions — Error-Free Drafts

Day 6: Audit and Control Language

- Audit Vocabulary of Findings, Evidence and Management Responses — Precise Replies
- Answering Auditor Queries in Writing — Factual, Complete Responses
- Internal Control Descriptions — Explaining Processes and Approvals Clearly
- Reconciliation and Adjustment Explanations — Justifying Journal Entries
- Sensitive Message Wording for Errors and Delays — Professional Candour

Day 7: Presenting Financial Results in English

- Results Presentation Structure — Headline, Drivers, Outlook
- Signposting Language for Slides and Charts — Guiding Listeners Through Data
- Voice, Stress and Pace With Figures — Comprehensible Delivery
- Visual Description Phrases for Graphs and Tables — Clear Commentary
- Concise Executive Summaries Spoken Aloud — Respecting Senior Time

Day 8: Questions From Analysts, Auditors and Committees

- Question Types From Analysts and Board Members — Anticipating Lines of Enquiry
- Clarifying and Paraphrasing Questions — Avoiding Misunderstood Answers
- Buying Time and Deferring Politely — When Data Is Not to Hand
- Handling Challenging or Hostile Questions — Calm, Factual Responses
- Finance Committee Meeting Participation — Proposing, Agreeing and Objecting

Day 9: Negotiating Financial Terms in English

- Negotiation Language for Rates, Fees and Repayment Schedules — Clear Positions
- Conditional Structures for Offers and Concessions — If-Then Proposals
- Diplomatic Disagreement Phrases — Protecting Client and Supplier Relationships
- Summarising Agreed Terms Verbally and in Writing — Avoiding Disputes
- Telephone and Video Call English With Counterparties — Remote Negotiation

Day 10: Practising the Finance English Portfolio

- Variance Commentary and Results Email Pair — Applying Writing Skills
- Results Presentation With Live Questions — Applying Presenting and Q&A
- Negotiation Role Play on Lending or Supplier Terms — Applying Negotiation Language
- Audit Response Letter — Applying Control and Audit Vocabulary
- Finance English Portfolio — Peer Feedback and Personal Targets

Applying English for Finance and Banking Professionals After the Course

- Rewrite the variance commentary of the next monthly report using the cause and effect and hedging structures taught, then ask a reviewer to compare clarity.
- Prepare and rehearse a five-minute results briefing in English for the next finance or committee meeting, including three anticipated questions and answers.

English for Finance and Banking Professionals Questions FAQ

What is English for finance and banking professionals, and why does it matter now?

English for finance and banking professionals is the vocabulary, grammar and communication skill needed to report, explain and negotiate financial matters in English. It matters now because reporting, audit, lending and investor dialogue increasingly run in English across borders.

Which roles gain most from English for finance and banking professionals training?

Accountants, finance officers, bankers, analysts and treasury staff who work in English as a second language gain most. Participants from banking, insurance, energy and manufacturing finance teams use it in reports, audits, client meetings and committee presentations.

How does English for finance and banking professionals training differ from a general business English course?

It concentrates on finance language rather than general workplace English. You work on financial statement vocabulary, variance commentary, audit responses, results presentations, analyst questions and negotiation of financial terms instead of everyday meetings and correspondence.

What do you bring back from English for finance and banking professionals training?

You bring back a finance English portfolio with variance commentary, a results email, a presentation script with prepared answers, an audit response letter and a personal vocabulary log for continued practice.

English for Finance and Banking Professionals: The Way Forward

The finance English portfolio holds each participant's tested commentary, emails, presentation scripts, audit responses and vocabulary log. Its first use is the next month-end report or results meeting, where it shapes how figures are explained. Finance staff use it daily and their managers use it to align team wording. After a reporting cycle, the commentary phrases deserve review against reader questions.