

Grow your career.
Level up for the future.

Schulich Masterclass Certificate in Venture Finance

Level up with LEEN LI, Chief Executive Officer at
Wealthsimple Foundation



Schulich
School of Business
Executive Education

YORK U





Schulich Masterclass Certificate in **Venture Finance**

Do you want to unlock the secrets of building and growing your Finance function? Well, you've hit the jackpot: this online program will give you tips and tricks for navigating partnerships with founders and other executives and scaling your operations for a venture-backable company.

Better yet, learn directly from a top Venture Finance executive herself: Leen Li is the Chief Executive Officer of Wealthsimple Foundation.

Grow your career.
Level up for the future.

 30 hours of study over 6 weeks

 Book this program [online](#)



Schulich Masterclass Certificate in **Venture Finance**

You're an early or mid-career finance and accounting professional. Sure, you're looking for need-to-know information about Venture Finance, but you also want to make your mark.

If this is you, then you've found the right place. Our MasterClass program provides the nitty gritty essentials of the industry and walks you through how to create and apply a Financial strategy that brings value to your organization. Understand how to manage day-to-day finances and accounting in early-stage startups. Manage internal processes to assist fundraising. Foster relationships with other VC-backed businesses and angel investors. Prepare financial models to guide your workplace through growth and support your fundraising story.



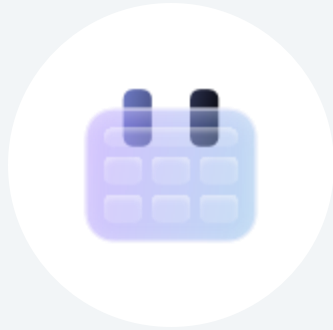
30 hours of study over 6 weeks



Book this program [online](#)

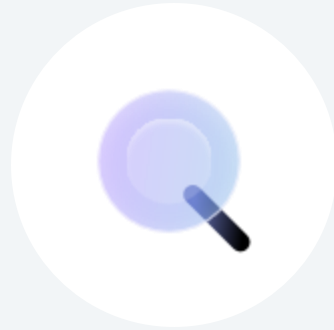


Program Highlights



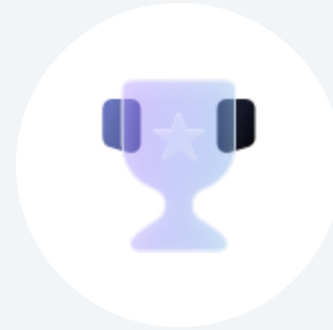
30 Hours of Study

Rich learning in just 30 hours of study over 6 weeks



Stand Out from the Crowd

Network and get exclusive tips, tricks, and practical knowledge for success. Set yourself apart as someone with the know-how, backing, and contacts to break into the industry.



Learn from the Pros

Gain private access to prerecorded or live lessons with Leen Li, Chief Executive Officer at Wealthsimple Foundation. Get a leg up in the industry by connecting with one of its stars.



Masterclass Certificate

After completing the program, receive an authentic digital badge from the #1 business school in Canada that employers will recognize.



Program Faculty



Leen Li

Chief Executive Officer at
Wealthsimple Foundation

Leen is the Chief Executive Officer at Wealthsimple Foundation, a grassroots charitable organization focused on breaking down the barriers to post-secondary education across Canada. She has over 20 years of experience in the technology and financial services industry, where she held a number of senior positions, including Chief Financial Officer at Wealthsimple and Vice President of Finance and Operations at Influitive.

Leen transitioned to her current role in the not-for-profit sector due to a deep personal drive and dedication to the goal of improving financial futures for folks from underrepresented communities. She brings a positive can-do attitude to everything she does and contributes a significant portion of her time, energy, and dollars to improve the lives of others.

Leen is actively involved in the community and lends her time and energy to a number of technology and education initiatives while simultaneously acting as an advocate for women and people of colour. She sits on the board of CanadaHelps and George Brown College Foundation.

Leen was voted one of the Top 25 Canadian Immigrant Awards in 2022, one of DMZ's Women of the Year in 2021, and one of Canada's 50 Best Executives by the Globe and Mail in 2020. Born and raised in China, Leen is the youngest of five girls. She came to Canada as an international student over 20 years ago, where she earned her Master of Business Administration from Saint Mary's University in Halifax.



This program stands out by covering the complex intricacies of managing the Finance function in the startup world. Through interactive sessions, you'll gain insights into financial strategy, fundraising document preparation, and decision-making specific to venture-backed companies.

Leen Li
Program Director



Program Content



Module 1: Financial Management and Reporting

To begin, this module discusses the priorities of Finance professionals at early-stage VC-backed companies, the differences between an accounting-focused and operational-focused finance leader, and practical tips to manage the Finance functions with limited resources.

- Design a month-end closing process and reporting package tailored to venture-backable startups
- Identify key areas to focus on within the day-to-day accounting and finance function
- Analyze key stakeholders and how to leverage 3rd party vendors and/or softwares to manage finance function efficiently

Module 2: Prepare for Fundraising

This module will help learners understand the requirements and preparation needed to facilitate an institutional round of fundraising. We will discuss how to set up a data room, how to work with founders and other teams to prepare the pitch deck, and how to position your financial model to support the pitch story.

- Explain the key elements of a financial model that are designed for fundraising
- Organize the key documents and data required for a data room
- Recognize the process to develop a compelling fundraising pitch deck

Program Content



Module 3: Fundraising and Due Diligence

Fundraising is often the lifeblood of many startups, especially in the early stages. We will discuss how to run an efficient fundraising process, your role during the fundraising, and how to partner with other business leaders to ensure the continuous business success while fundraising. Understanding these components is key in helping a startup succeed during this high-pressure period.

- Describe how founders manage the fundraising funnel and data sharing
- Collaborate with different teams to ensure that everyone who is involved in the fundraising process is aligned with the same business objectives
- Manage the due diligence process to ensure that information presented to potential investors is accurate and consistent with the pitch and the financial model

Module 4: Monthly Business Reviews

Aside from fundraising, we need to think about the long-term financial health of the startup. This module will help learners grow their skills beyond traditional accounting and prepare them to be a true business partner to founders and other senior leaders within their organization. Learn how to leverage financial and operational information to drive changes and scale a startup, especially as the organization grows beyond the early stages.

- Develop a monthly operational review process to provide a full picture of how your startup has performed in all aspects of the business
- Assess how to work with business leaders to draw learnings and insights from this process, and implement changes to improve business performance
- Leverage the monthly business review to prepare for quarterly board meetings

Program Content



Module 5: Business Growth and Annual Planning

This module will discuss how to leverage the annual planning cycle and more frequent forecast and reporting opportunities, in order to influence other functions in the organization, such as: sales, marketing, customer success, research and development, and people operations. The intention is to drive growth for the organization, and to do so in a proactive and tactical manner.

- Develop an efficient and collaborative annual planning process
- Apply the top-down approach to facilitate the strategic capital allocation discussion during the annual planning cycle
- Compare the different approaches of partnering with each business function to provide timely and insightful information

Module 6: Finance in Difficult Times

The world of startups and scaleups is competitive as it is. Adding the context of a post-pandemic world, as it deals with a recession, startups need to be more intentional in their decisions. The module will help learners understand the process of scaling up and scaling down a business to ensure that their organizations are prepared for uncertainty from a cash flow perspective.

- Discuss the early signs of a start-up company that needs to pivot or pause
- Review the different approaches to extend your company's runway
- Determine how to show up in front of your team, your organization, and your investors as a finance leader through good times and difficult times

Program Content



Project: Monthly Business Review Package

Following Module 4, each participant will be expected to integrate the course learnings back to their workplace by developing a detailed monthly business review deck to facilitate the right level of discussions among senior leaders. This project will provide relevant, real-world learnings and insights to guide business growth.

- For the Instructor-Led option, the Instructor will provide feedback on your first draft, with the intention that each participant will implement or improve the monthly business review processes in their own organizations.
- Integrate course learnings to produce a monthly business review deck, which includes: financial information, operating metrics, and variance analysis and insights to help a VC-backed business grow and scale
- Incorporate the Instructor's feedback and refine your monthly review deck. Note: You may need to update your financial model to incorporate feedback.
- Present the findings in your organization, in order to drive changes through a consistent and monthly business review process

Graduation Networking Event with **Industry Leaders**



Chris Carder

Executive Director, Office of Innovation and Entrepreneurship at Schulich School of Business



CherryRose Tan

Entrepreneur in Residence, Office of Innovation and Entrepreneurship at Schulich School of Business

Join Us in Celebrating **You.**

Celebrate your program graduation with Senior Leaders in the Venture Ecosystem and Leaders from the Schulich Startups Community. An opportunity to make in-person connections with top professionals and network for future job opportunities. Hosted in downtown Toronto at Schulich ExecEd.



Prashant Matta

General Partner
Panache Ventures



Jenny Do Forno

Chief People
Officer
TouchBistro



Izabella Gabowitz

VP of Operations
Q2



Leen Li

CEO
Wealthsimple
Foundation



Suhail Hafiz

CEO
Contrarian
Investment Partners

Who Will Benefit



Early and Mid-Career Finance and Accounting Professionals

Early and mid-stage finance and accounting professionals can expand their experience and knowledge of working with startups or venture-backed companies. Better understand the difference between VC-backed companies and traditional companies, and understand the lifecycle of startups.

Completion Benefits

After completing the Schulich Masterclass Certificate in Venture Finance, you'll receive an authentic digital badge from the #1 business school in Canada that employers will recognize.

As more and more companies look for candidates with specific skills, this badge on your CV will be a credible assurance of your achievements and expertise, allowing the right roles to find you faster.



Masterclass Certificate

You've completed a series of unique, high-level modules, which constitute a Masterclass Certificate.

Why a Certificate at Schulich ExecEd?

There will no longer be a single transition from graduation to work in one's life.

Because few of us have the same job for life, we constantly have to re-invent ourselves, learn new skills and adapt to the changing marketplace and business environment. Today's professionals and executives must be able to quickly develop and fine-tune personal business skills to adapt and grow.

We are #1 Business School in the Country

We have the privilege of being ranked #1 and teaching top students from around the world.

Our Program is Unique

Distinction from growing competition in the job market.

We Provide a Combination of Skill Specialization & Range

Deepen your current skills and acquire new ones.



About Schulich ExecEd

At Schulich ExecEd, the professional development arm of the world class Schulich School of Business, all our programs are non-degree, mid-career acclaimed qualification that employers recognize and that you can add to your CV.

We Provide:

- Short programs building an individual business skill have industry recognized credentials for that skill
- Certificate programs build a wider skill set with a number of key skills
- Masters Certificates are an intense dive into Leadership, Management or specific Business skillsets. This is our highest mid-career professional development business school certification

Key Stats:

- Ranked #1 business school in Canada
- Ranked #12 in global MBA ranking
- Educated over 80,000 professionals across the world.
- Delivered over 4,000 programs virtually and in-person
- 96% of our graduates used knowledge or skills from the program on the job
- 87% of our graduates reported improved job performance
- Worked with over 500 companies worldwide

Over 450 leading faculty in areas of management, leadership, communications, finance, marketing, business development and strategy





Schulich ExecEd, Schulich School of Business at York University

500-222 Bay Street. Toronto, Ontario M5K 1K2

1.800.667.9380

execedinfo@schulich.yorku.ca

execed.schulich.yorku.ca



SchulichExecEd



SchulichExecEd



SchulichExecEd



SchulichExecEd

