



CPD Course | Dept. Construction Economics and Management

Excel for Property Practitioners

1 June 2018



Course Objectives



This course is designed to expose participants to introductory financial mathematics, which are implemented within a spreadsheet environment (Excel) within a commercial property context. On completion of this course, participants will be able to:

- Understand the fundamentals of financial mathematics applicable to commercial property.
 - Understand the Excel environment.
 - Understand the alignment of financial mathematics with the basic financial functions in Excel.
 - Build a basic property cash flow, which comprise live variables.
 - Understand how to calculate an initial return.
- Understand how to apply conditional formatting.
 - Implementation of graphs to summarise data.
 - Build a dynamic amortisation table.

Course Content

- Revision of financial mathematics (compound interest, annuities – both ordinary and annuity due, amortisations).
- Entering basic equations in Excel.
- Using basic financial functions to calculate future values, present values.
- Building a basic property cash flow with live variables (absolute referencing).
- Calculating initial return.
- Conditional formatting.
- Building an amortisation table, which will be dynamically linked to all the loan variables.

Who Should Attend

This course will be of benefit to all who operate in the commercial property industry but have not acquired formal excel training or feel the need to refresh their basic Excel skills. This includes junior/middle management level professionals that struggle to convert non-automated property data into customised spread sheets for bespoke analysis. Participants are required to bring a laptop with a recent version of Excel (either Windows or Apple based machines are acceptable).

Format

The course is intensive and will take place in one day. The day will be split into four sessions, three lecture sessions and one tutorial where participants will be tasked with building a financial model. All slides and templates will be available online and participants will be granted access to the online portal in order to prepare adequately.

Course Presenters

Sean Godoy is a property professional with 8 years' experience working in various sectors of the property industry, in South Africa and the UK. He has lived in London for 4 years and relocated back to Johannesburg in 2017. He worked for Eris Property and IPD (MSCI) in South Africa, and JLL and Cushman & Wakefield in London. He also worked in affordable housing while in the UK.

Most of his professional experience has been in market analysis and he had developed a strong understanding of, and interest in, property markets and what makes them tick. More specifically, but still rather broadly speaking, global markets, cities and emerging economies interest him. He now operates as an independent consultant through his company Divercity Property Solutions with the aim of assisting investors, occupiers and other organisations or individuals.

Saul Nurick teaches on the Property Studies programme at the University of Cape Town's Department of Construction Economics and Management. He teaches property financial mathematics, property feasibility analysis and property finance to undergraduate property studies students. He holds a BCom, BSc(Hons) (Property Studies) and MPhil degrees from the University of Cape Town. He is also registered as a chartered surveyor with the Royal Institution of Chartered Surveyors (RICS). Prior to joining UCT he worked in the listed property sector, and also briefly as a consultant for a project management company in the UAE

Course Overview

Name	Excel for Property Practitioners
Date	1 June 2018
Venue	Holiday Inn, Sandton, Johannesburg
Time	09h00 – 16h00
CPD	1 CPD point, ECSA validation number: UCTEPP18
Fees*	Standard delegate: R2500.00
Other	For technical enquiries contact Sean Godoy (sean@divercityproperty.com) and/or Saul Nurick (sd.nurick@uct.ac.za)

*The course fee includes online course notes as well as lunch and refreshments.

Registration

Registration and Cancellation

- **You can register for this course in one of the following ways:**
 1. [register online](#) or
 2. [download](#) the registration form and email it to ebe-cpd@uct.ac.za
- Registration covers attendance of all sessions of the course, teas and lunches, and course material
- Registrations close one week before the start of the course. Confirmation of acceptance will be sent on receipt of a registration form.
- Cancellations must be received one week before the start of a course, or the full course fee will be charged.
- **For more information on application and registration procedures, please visit our website:** www.cpd.uct.ac.za/cpd/applications

Certificates and CPD Points

A certificate of attendance will be awarded to CPD participants. Participants need to attend the full course in order to qualify for an attendance certificate. CPD participants can also request a formal university transcript, which will show this course as part of a Professional Development Career.

Contact details

For more information or details on CPD courses, visit our website or contact us.

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