

# PyroTalks CIC

## Understanding the Financial World for Major Gift Fundraisers

*With Jon Jeffery*

Technical knowledge (70%)	Topic	Sub topics
	Overview of investment bodies and the key players	<ul style="list-style-type: none"> <li>• Acqui-hiring</li> <li>• Central banks</li> <li>• Commercial banks</li> <li>• Investment banks</li> <li>• Investment funds, hedge funds</li> <li>• Private equity</li> <li>• Techpreneurs</li> <li>• Venture capital</li> </ul>
	Key job titles and what they mean	<ul style="list-style-type: none"> <li>• Analyst</li> <li>• Banker</li> <li>• CEO / CFO</li> <li>• Fund Manager</li> <li>• Hedge Fund Manager</li> <li>• Investment Manager</li> </ul>
	Company types and their significance	<ul style="list-style-type: none"> <li>• LLPs</li> <li>• LTDs</li> <li>• PLCs</li> </ul>
	Principles of financial statements	<ul style="list-style-type: none"> <li>• Balance sheet</li> <li>• Cash flow statement</li> <li>• Cash vs. Profits</li> <li>• Income statement</li> <li>• Net assets</li> </ul>
	Sources of wealth and how to track their performance	<ul style="list-style-type: none"> <li>• Chattels</li> <li>• Commodities</li> <li>• Fixed interest</li> <li>• Property</li> <li>• Shares</li> </ul>
	Key resources	<ul style="list-style-type: none"> <li>• Free sources and how to access / interpret them</li> <li>• Key sources of information</li> </ul>

Practical application 30%	Topic
	Understand the daily concerns of your prospects to inform interactions
	How to assess if the donor really can make the gift they are pledging

	When it is the “right time” to make an ask
	How to track your prospects company sales and news
	How to use financial information to better refine your asks and your case for support
	What you should be reading every day