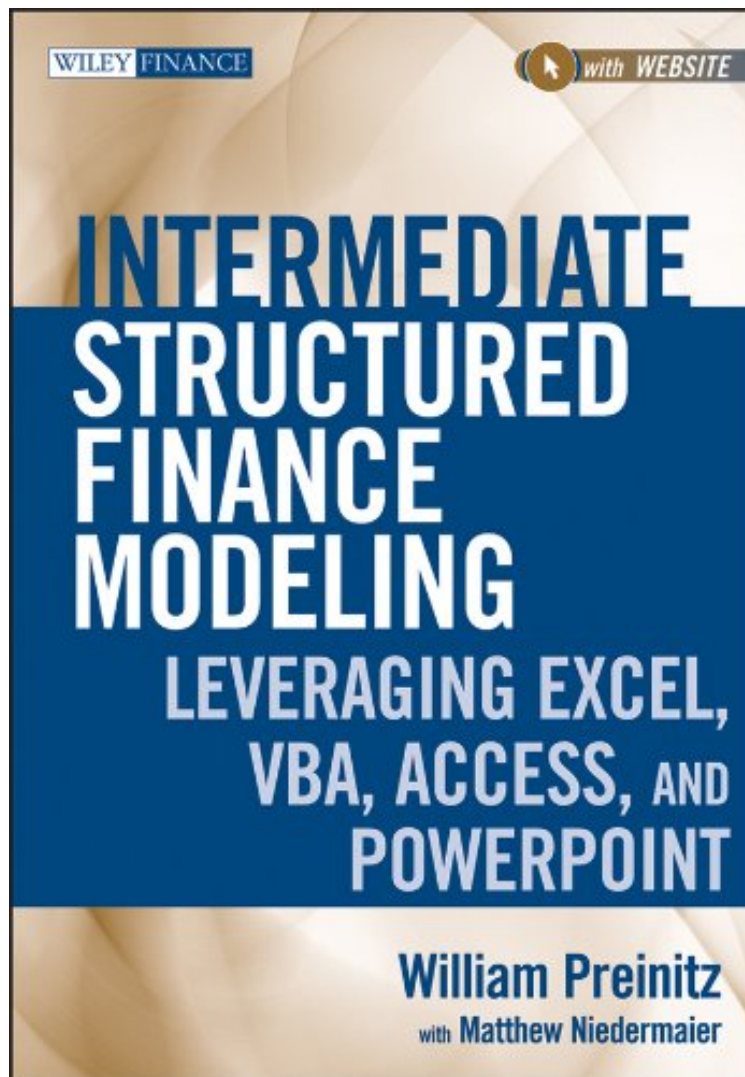


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## Intermediate Structured Finance Modeling: Leveraging Excel, VBA, Access, and Powerpoint (Wiley Finance)

*William Preinitz, Matthew Niedermaier*  
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Valuation: Jump Start VBA (Wiley Finance), I was already familiar with the existing model that is presented in Chapter 2. This book takes you step by step (literally) through the enhancement of the existing securitization model. Creating an enhanced model that utilizes tools like Access and Powerpoint is quite an involved process. It's not clear how straightforward it would be for someone to encounter this model and run with it without having gone through it in the first book. Preinitz, however, makes a solid effort to light your path by providing detailed explanations throughout the book and many chapters of supplemental material on the accompanying website. I admit that I was mentally exhausted by the time I finished going through all of the materials. But the level of understanding I gained would have taken much more time (months, years?) to acquire were I to learn on-the-job. Just reading this book may be informative, but one can only truly understand structured finance transactions by doing. The author has provided an enormous amount of resources and detailed instruction, giving you the responsibility of following through. If you are willing to put in the time, this book is thoroughly rewarding. 2 of 3 people found the following review helpful. Sure does leverage

By AvidReader I've read both of Preinitz's books. Each is highly organized and well thought out. This one continues where the contents of the first left off. The original SBA loan portfolio used as an example in the introductory level book is replaced by a larger and more complex asset-backed cash flow model that uses a residential mortgage portfolio. If the user wants to undertake an example of transforming an existing simple model into a more complex one, the first six chapters do just that. If, however, an advanced level reader prefers, one can start directly with Chapter 7. Preinitz shows how to, by explicit but manageable segments of VBA code, incrementally build an asset and a liability model. As a modeler with a basic VBA background, I can easily interpret the code purely from its nomenclature and standardized approach. The most awesome part of the finished model (provided in the Web site) is the use of aesthetically pleasing UserForms (for input) and the speed and visual impact of automatically produced presentation format reports (for output) using PowerPoint. It's a plus that the instruction and code also uses Access (for database management) and Outlook (for messaging). The only criticism I can offer is that the reader must be prepared for comprehensive study. There is no superficial quick approach to this author but I can see easily how the techniques, once mastered, can be time-saving after the initial effort is invested. I highly recommend this book. This appears to be a set of modeling techniques developed over a long career that are condensed into one VBA platform.

This book provides a pragmatic, hands-on approach to reaching an intermediate level of sophistication as a financial modeler. Expanding on the first book, *A Fast Tract to Structured Finance Modeling, Monitoring, and Valuation*, the book will guide you step-by-step through using learned principals in new and more powerful applications. These applications will build on the knowledge of Excel and VBA gained, expand the use of Access for data management tasks, as well as PowerPoint and Outlook for reporting and presentation tasks.

From the Inside Flap Regardless of your financial specialization, this book is an essential learning tool in leveraging Microsoft products in whatever modeling applications you choose to build. The principles outlined here can be readily employed across all fields of financial and non-financial modeling. This book is written for financial analysts who have a working knowledge of Excel and VBA and who wish to enhance their productivity and marketability by improving their modeling expertise. The goal of the book is to broaden the reader's Excel/VBA skills and to demonstrate the progressive integration of Access, PowerPoint, and Outlook into a modeling environment. Significant attention is also directed to the design and execution of an Excel/VBA user interface employing complex UserForms. The focus of the book is a case study containing a structured finance model. An existing Excel/VBA model is segregated into separate Asset and Liability Models. These two models are then extensively developed by creating sophisticated UserForm interfaces, expanding computational subroutines, and implementing more elaborate and detailed report packages. Access databases are then incorporated to manage sets of model inputs and results. The capability to automatically produce a ready-to-use PowerPoint presentation is also added. Finally, Outlook is integrated to automate status reporting and distribution of model report packages. The book contains over 750 exhibits of VBA and Access code, Excel menus and UserForms, as well as financial calculation algorithms and reports. Complete working versions of all models, their input files, and report results are included on the Web site. Other web chapters contain detailed instructions on how to create a directory environment to download and run the models, supplemental bond and mortgage math primers, a discussion of representative line generator programs, and a tutorial on Excel UserForms. This book is the intermediate-level companion volume to *A Fast-Track to Structured Finance Modeling, Monitoring, and Valuation: Jump Start VBA*, an introductory work on the subject.

From the Back Cover A pragmatic, hands-on approach to reaching an intermediate level of sophistication as a financial modeler Intermediate Structured Finance Modeling is packed with insight and tips to teach you step by step to expand your current level of organizational, coding, modeling, and financial skills to enhance and develop new and more powerful applications. It expertly employs a code-intensive approach to improve your VBA and Excel skills and demonstrates how to integrate them with a real-life application. Providing you with a set of immediately applicable modeling approaches, techniques, skills, and examples with a focus on large model development, you will learn how to: Organize and build a set of directories to contain the model system you will develop Separate an existing basic structured finance model into two

special-purpose models, an Asset (collateral) model and a Liabilities Structure (bonds) model Expand the computational, data management, and reporting capabilities of both new models Employ Excel UserForms to build a sophisticated model interfaces Introduce Access databases and code to manage model data requirements and outputs Dramatically expand existing reporting packages, producing more sophisticated analytical results Automate the production of ready-to-use PowerPoint presentations Improve your model's ability to distribute its results by integrating Outlook mailing lists If you have some modeling experience and are confident in your mastery of the fundamental features of VBA and Excel, Intermediate Structured Finance Modeling is the book for you. With working solutions to the challenges of developing larger scale models, you will learn successful intermediate modeling techniques that can be applied to any real-world situation and activity. This book is the intermediate-level companion volume to A Fast-Track to Structured Finance Modeling, Monitoring, and Valuation: Jump Start VBA, an introductory work on the subject. About the Author WILLIAM PREINITZ has thirty years' experience in investment banking and structured finance analytics. A former managing director at Citigroup, highlights of his career include the creation and marketing of securitizations backed by 12b-1 mutual fund fees. With a team of ten people over a fifteen-year period, his group concurrently provided analytical structuring support for the over 100 different asset classes contained in the ABCP program of the bank. These included such varied items as movie revenues, fast-food franchise financing, and communication satellite leasing. In conjunction with the bank's corporate training program, he taught Excel/VBA modeling classes to over 300 people ranging from associates to managing directors. MATTHEW NIEDERMAIER is currently a vice president in the Structured Finance Group at Markit, where he is a member of a pricing and valuation group focused on agency mortgages and CMOs. Within Markit he has also taught courses in Excel/VBA globally. Prior to Markit he modeled U.S. and Latin American ABS deals at Citigroup, including auto loans, credit cards, and timeshares.