



AI in Finance

From Fundamentals to Practical Application

DURATION: 1 Day

TRAINER: Dr Ismael Essackjee, Certified AI Consultant from USAII

INTRODUCTION

Artificial Intelligence is no longer a future concept; it is actively reshaping how finance and accounting functions operate today.

From automated reconciliations to predictive forecasting, fraud detection, and intelligent reporting, AI is transforming the role of finance professionals from record-keepers to strategic decision enablers.

However, the real value of AI does not lie in the tools themselves, but in how professionals:

- Ask the right questions
- Structure their thinking
- Apply AI responsibly
- Use outputs to support sound financial judgment

This one-day interactive programme is designed specifically for finance and accounting professionals to:

- Understand AI fundamentals in a clear, non-technical way
- Master prompting techniques using ChatGPT
- Apply AI to real finance tasks (reporting, analysis, compliance, communication)
- Explore practical tools beyond ChatGPT
- Build confidence to integrate AI into everyday workflows

The programme is highly practical, combining concepts, demonstrations, and hands-on exercises.

LEARNING OBJECTIVES

By the end of this one-day training, participants will be able to:

1. Understand what AI is and how it applies to finance and accounting
2. Differentiate between traditional automation and AI-driven systems
3. Use structured prompting techniques to obtain accurate, useful outputs
4. Apply AI tools to common finance tasks:
 - Financial analysis
 - Reporting
 - Forecasting
 - Audit preparation
 - Compliance documentation
5. Improve productivity in Excel, reporting, and communication using AI
6. Identify risks, limitations, and ethical considerations of AI
7. Use AI tools responsibly without compromising confidentiality



8. Build a personal “AI toolkit” for daily work
9. Develop a practical action plan for immediate implementation

COURSE OUTLINE

Course Title: AI in Finance			
Learning outcome			
1	Understand AI concepts and their practical applications in finance and accounting.		
2	Apply AI tools and prompting techniques for financial analysis, reporting, budgeting, and communication.		
3	Use AI responsibly while recognising risks, confidentiality requirements, and governance considerations.		
Topics	Subtopics	No of Contact hours	Trainer
AI Foundations & Prompting Techniques	<ul style="list-style-type: none"> ▪ Introduction to AI, Generative AI, AI vs automation, CLEAR prompting framework, finance prompts 	2 Hrs	Ismaël Adam Essackjee
AI for Financial Analysis, Reporting & Budgeting	<ul style="list-style-type: none"> ▪ Financial reporting, variance analysis, management insights, forecasting, scenario planning 	2 Hrs	Ismaël Adam Essackjee
AI in Excel, Audit, Risk & Compliance	<ul style="list-style-type: none"> ▪ Data analysis, Excel AI features, audit preparation, fraud detection, compliance and risk awareness 	1.5 Hrs	Ismaël Adam Essackjee
AI Tools, Communication & Responsible Use	<ul style="list-style-type: none"> ▪ ChatGPT, Copilot, finance communication, confidentiality, bias, governance, action planning 	1.5 Hrs	Ismaël Adam Essackjee