

**REGISTER 3 PAX, FREE 1 SEAT**

**14 Hours ZOOM & PHYSICAL Program**



# LEVERAGING CLAUDE AI for Accounting & Finance Professionals



## HYBRID TRAINING

**12 & 13 Oct 2026 (Mon & Tue)**

 Remote Online Training (**Zoom**) &  
 Dorsett Grand Subang Hotel,  
Selangor (**Physical**)

**\*\* Choose either Zoom OR Physical Session**

**Who should attend:** Junior, Senior executives, managerial Level Finance & Accounting Professionals who wants to upskill and leverage Claude Generative Artificial Intelligence (AI) version tools for productivity improvement.

## OBJECTIVES

On completion of the programme, participants will be able to:-

1. Understand the fundamentals of Claude Generative AI and its AI hybrid application tools in accounting and finance.
2. Learn how to use AI to automate routine accounting tasks like bookkeeping, budgeting, support financial analysis and financial reporting.
3. Confidently use Claude Free and Pro for core accounting and finance tasks, with clear awareness of data privacy obligations
4. Enhance decision-making using AI-driven models and simulations.
5. Articulate where AI tools genuinely augment professional judgement and where human expertise must prevail, in alignment with MIA, ACCA, and CPA professional standards
6. Understand and apply enhanced ethical and privacy issues involved in AI deployment within financial environments.

## Training Approach

Where appropriate, activities will include the following:

- ✓ Hybrid Class Interactive lectures
- ✓ Gamified Spot Quizzes for Pre and Post Test
- ✓ Hands-on practical exercises using real-world datasets and crafting a customised AI prompts.

## CONTACT US



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## COURSE OVERVIEW

Claude 4.6 AI tool series have seen a massive surge in AI generative tool popularity by positioning itself as the "Pro-Grade" choice for deep work, complex engineering, and long-form writing. Also, it has massive 1 million tokens windows which can remember and perform reasoning of about 750,000 words and 30000 codes.

These two days course is designed to equip accounting and finance professionals with the knowledge and practical skills needed to leverage latest Claude Generative Artificial Intelligence (AI) tools technology. The course will introduce participants to enhanced Claude AI which was adaptive reasoning feature to support productivity improvement like dashboard data preparation, instructions for agentic task automations, deeper and complex calculations and data analysis for better insights in accounting and financial data.

Participants will explore the fundamentals of generative AI, understand its application in accounting operations, financial reporting and analysis. Participants are expected to engage in hands-on exercises to integrate AI like customising daily workflows for automation, create AI agents and leverage AI for insights and learning latest technical accounting and finance standards.

The course combines theoretical understanding of AI use cases and hands on practical exercises using sample data sets. Besides, the ethical considerations of use of any generative AI tool will be highly emphasised for data privacy and protection.

**Tools needed:** Laptop, Devices, Tools Covered: Claude Free & Claude Subscription Pro (claude.ai) and hybrid generative AI tools with Claude features (example: POE.com, Use AI)

# COURSE CONTENT

## **Module 1: Meet Claude, Your AI Finance Co Pilot**

- Understand key terms in AI like Deep learning, Machine learning, Natural Language Processing (NLP) and neural networks and how it reflects in Gen AI tools like for accounting and finance tasks.
- Dos and Don'ts in crafting prompts for generating output for AI Tools.
- Claude Free vs Pro: feature comparison relevant to finance work
- Setting up Claude safely in a corporate or SME environment
- Understanding knowledge cutoff dates and their impact on financial guidance
- First practical prompts: explaining accounting and taxation latest standards and updates

## **Module 2: Prompt Engineering techniques**

- The anatomy of a great finance prompt: Role, Task, Context and Format
- Prompt chaining for multi-step accounting workflows
- Negative prompting: excluding irrelevant or harmful outputs
- Configuring Claude Projects for recurring finance tasks
- Building reusable prompt templates for management accounts commentary
- Iterating and refining outputs — giving productive feedback to Claude

## **Module 3: Financial Reporting & Analysis Accelerator**

- Drafting Management Discussion and Analysis narratives with Claude
- Variance analysis commentary: actual vs budget vs prior year
- Summarising financials for non-finance stakeholders and SME owners
- MFRS and MPERS disclosure note drafting and gap review
- KPI dashboard interpretation and anomaly identification
- Audit support: working paper narratives and review checklists

## **COURSE CONTENT**

### **Module 4: Leveraging Claude as Accounting and Taxation Technical Research Agent and Companion**

- Malaysian tax research with Claude: ITA, Public Rulings, LHDN guidelines
- Sales and Services Tax: scope, exemptions and registration obligations
- Creating AI Agents or customized prompts for agentic mode tasks for subject matter expertise.
- Corporate tax provision workings: narrative and disclosure support
- Transfer pricing documentation: structuring TP reports with Claude
- Critical verification workflow: when and how to cross-check Claude on tax matters

### **Module 5: Budgeting, Forecasting and Financial Planning and Analysis**

- Scenario planning narratives: base, bull and bear case storylines
- Drafting budget assumptions documents and board budget memos
- Zero-based budgeting: challenging cost centre assumptions with Claude
- Rolling forecast commentary — automating the analytical narrative
- Cash flow forecasting: risk factors and sensitivity analysis narratives
- KPI target-setting frameworks with Claude as a strategic sounding board

### **Module 6: Data Storytelling & Finance Communication**

- Structuring finance presentations for different stakeholder audiences
- Building data dashboards and narratives
- Writing executive summaries: one-page financial briefs with Claude
- Email drafting: collections, credit limit requests, audit query responses
- Slide deck content: presenter notes and CFO talking points

### **Module 7: Governance and AI Ethics for Future Ready Accountants and Finance Professionals.**

- AI hallucination risks in financial and tax contexts — real case studies
- PDPA 2010 compliance: data classification for AI use in finance
- Building an organisational AI Usage Policy for finance teams
- Human-in-the-loop controls and review workflows for AI-generated content
- Professional liability: Chartered Accounting Bodies Professional guidelines on AI assistance
- The future finance professional: skills to develop alongside AI tools