

REGISTER 3 PAX, FREE 1 SEAT



HARNESSING THE POWER OF **GENERATIVE ARTIFICIAL INTELLIGENCE (AI)** TOOLS For Accounting & Finance Professionals

14 Hours **ZOOM & PHYSICAL** Program



HYBRID TRAINING
18 & 19 Nov 2026 (Wed & Thu)



**Remote Online Training (Zoom) &
Wyndham Grand Bangsar Kuala
Lumpur Hotel (Physical)**

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

OBJECTIVES

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

1. Leverage Gen AI for analysing financial statements and support in generating insights and narratives.
2. Identifying financial risks and red flags using specific generative AI prompts
3. Leverage various Gen AI tools for accounting administrative tasks, generating investment insights and summaries
4. Supporting investment decision-making processes using generative AI tools
5. Understand and apply enhanced ethical and privacy issues involved in AI deployment within financial environments.
6. Start creating AI agentic, AI assistants with solid action plan for individual and department tasks improvements.

TRAINING APPROACH

Where appropriate, activities will include the following:

- Notes Deck
- Pre and Post Test Assessment
- Gamified Spot Quizzes
- Hands-on case based and practical exercises using and anonymised datasets
- Learning takeaway: Crafting customised AI prompts for routined work tasks



**HRD
awards
2022**

**TRAINING
PROVIDER**



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COURSE OVERVIEW

There has been massive surge in AI generative tools for accounting and finance. Ignoring generative Artificial Intelligence (AI) tools and its leverage in work productivity can no longer be ignored. Since year 2025, corporates and individuals had started to leverage generative AI for various departments for productivity improvements like work automation and processes.

This course is designed to equip **enterprise or individual generative AI tools basic to pro subscribers** with the knowledge and practical skills needed to leverage the latest version of current Generative Artificial Intelligence (AI) tools technology which was popular for productivity improvement in accounting and finance.

The course will introduce participants to the latest versions of generative AI tools which was adaptive reasoning feature to support productivity improvement like financial statement analysis, instructions for agentic task for basic finance automations and performing calculations and modelling any financial data in predictive manner for decision support. The course combines theoretical understanding of AI use cases and hands on practical exercises using sample data sets.

Participants are expected to engage at least 85% hands-on exercises to integrate AI like customising daily workflows for simple tasks automation, create AI agents and leverage AI for assisting in generative insights and researching on accounting, taxation technical updates.

Besides, the ethical considerations of use of any generative AI tool will be highly emphasised for customised prompting and to reduce AI hallucinations and ensure data integrity.

Target Audience: Accountants, finance professionals who are open, **with basic paid enterprise and individual subscription on generative AI tools** like ChatGPT, Claude, Gemini, Co-Pilot and wants to upskill and leverage Generative Artificial Intelligence (AI) version tools for tasks productivity improvement.

Prerequisite & Tools needed: Basic IT knowledge access for laptop, devices and basic subscription access to Generative AI Personal or Enterprise version. However, the hybrid generative AI tools free access will be introduced to participants in case of AI tokens limit are reached.

Mode of delivery and important Note: *Face to Face training. Enterprise paid subscription will be added advantage for Generative AI users to experience better use cases applications in Accounting and Finance.*

COURSE CONTENT

Module 1: How AI can be leveraged in Accounting and Finance

- 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.
- AI tools Free vs Pro: feature comparison relevant to finance work
- Setting up any Gen AI tool safely in a corporate or SME environment with customizing personalization.

Module 2: Prompt Engineering techniques and agentic AI applications

- 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 Gen AI in agentic mode for various Generative AI tools
- Building reusable prompt templates for management accounts commentary
- Iterating and refining outputs — giving productive feedback to Generative AI to 'train' your AI.

Module 3: Financial Analysis Accelerator and Dashboard Building

- First practical prompts on how to analyse financial statements via
 - Finance ratio, trend, vertical, horizontal analysis and cash flow analysis
 - Interpretation of financial health and performance
- Generate suggested narratives based on analysis made for various types of financial reports tailored to different stakeholders.
- Building dashboard visuals with data analytics based on cleaned data.

Module 4: AI Assisted Budgets and Forecast

- Scenario planning narratives: base, bull and bear case storylines
- AI-assisted projections (base, upside, downside scenarios) based on historical data
- Forecast simulation using historical actual financials

COURSE CONTENT

Module 5: Accounting, Taxation Technical Standards and Finance Tools Research Partner

- Prompting basics to research and summarise complex accounting, tax technical standards.
- Prompting summaries on step by steps day to day ERP and or any software access operational login, data entry and document upload step by step
- Generating summaries for long words contracts related documents

Module 6: Detecting of Unusual Transactions in accounting and finance records

- Generating deep dive analysis of red flag transactions like duplicated transactions, unusual journals posting.
- Detecting abnormalities in data.

Module 7: Governance and AI Ethics for Generative AI tool

- AI hallucination risks in financial and tax contexts — real case studies
- PDPA 2010 compliance: data classification for AI use in finance
- Sample Generative AI Privacy Policy and Procedures for Data privacy for corporate organisations