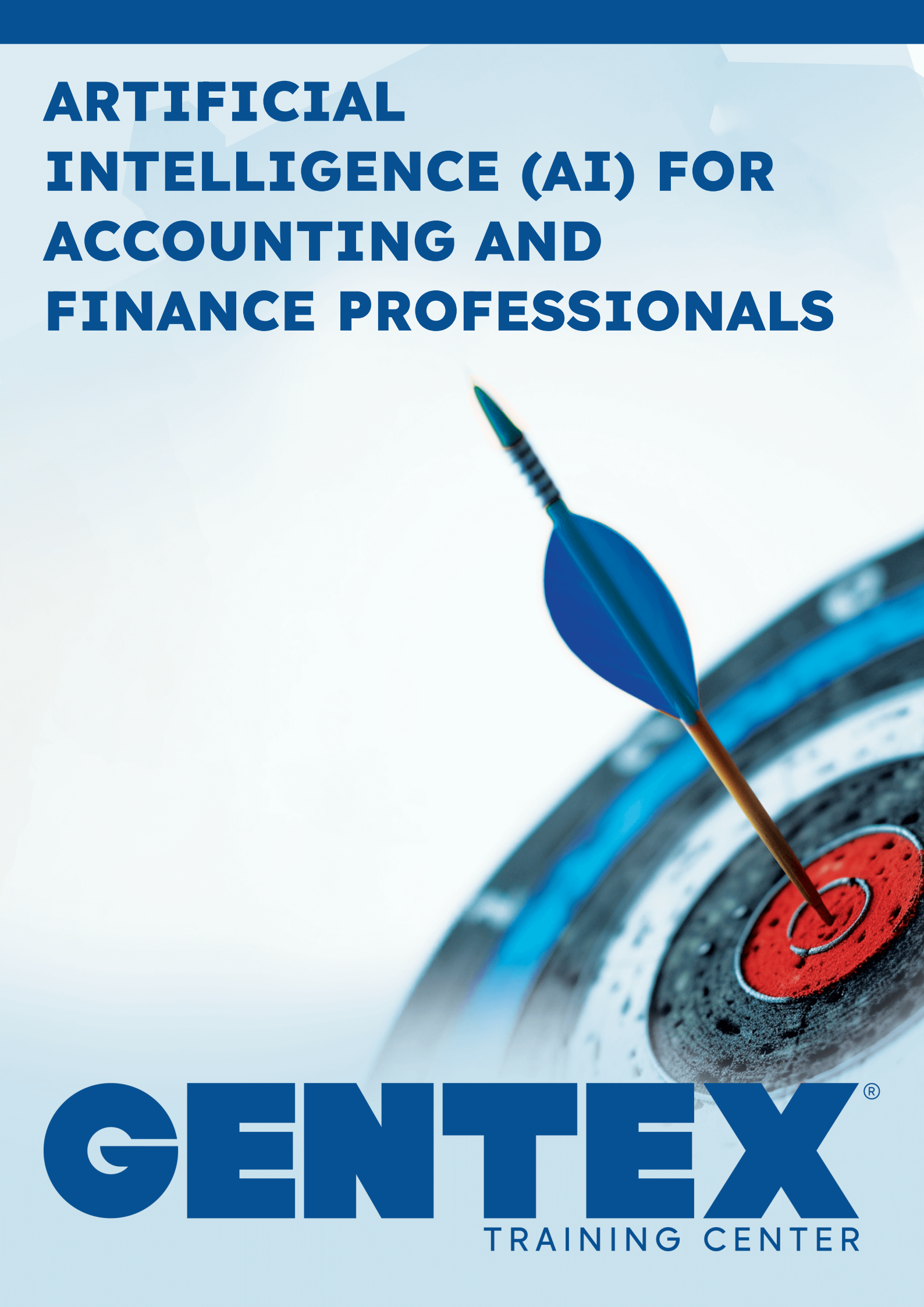
ARTIFICIAL INTELLIGENCE (AI) FOR ACCOUNTING AND FINANCE PROFESSIONALS



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Introduction

Artificial Intelligence (AI) for Accounting and Finance Professionals Training Course prepares finance and accounting staff to work productively alongside AI tools rather than around them. Routine tasks such as invoice coding, reconciliation matching, and report assembly now lend themselves to automation, and analytical tasks such as forecasting and anomaly detection benefit from machine learning. At the same time, AI introduces real risks: unreliable outputs, data privacy exposure, and overreliance without verification. This course covers both the tools and the judgement. It builds practical capability across accounting automation, financial analysis, and control. As a result, participants use AI to raise accuracy and free up time for higher-value work.

Artificial Intelligence (AI) for Accounting and Finance Professionals Course Objectives

- Explain AI, machine learning, and generative AI concepts in plain terms.
- Identify finance and accounting tasks suited to AI and automation.
- Apply AI tools to invoice processing, coding, and document extraction.
- Automate reconciliation matching and exception identification.
- Use AI for financial forecasting and variance anomaly detection.
- Apply generative AI to reporting narratives and analysis drafting.
- Evaluate AI outputs critically and verify results before use.
- Apply data privacy, confidentiality, and security requirements to AI use.
- Assess AI risks including hallucination, bias, and overreliance.
- Apply governance and documentation standards for AI in finance.

Course Methodology

- Interactive lectures with practical finance and accounting AI cases.

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- Hands-on prompt design and AI tool workshops.
- Automation and reconciliation matching exercises.
- Forecasting and anomaly detection practice with AI tools.
- Structured peer review with facilitator feedback on AI workflow design.

Who Should Take This Course

- Accountants and financial reporting professionals.
- Financial analysts and management accountants.
- Accounts payable and receivable staff.
- Auditors and internal control professionals.
- Finance managers exploring automation.
- Finance professionals using or evaluating AI tools.

Artificial Intelligence (AI) for Accounting and Finance Professionals Course Outlines

Day 1: AI Foundations for Finance Professionals

- AI, machine learning, and generative AI explained practically.
- Where AI fits in finance and accounting workflows.
- Task suitability assessment: rules, patterns, and judgement.
- Data preparation and quality requirements for AI.
- Available AI tool categories for finance functions.
- Limitations, hallucination, and verification discipline.
- Case study: mapping finance processes for AI suitability.

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Day 2: Accounting Automation and Document Processing

- Invoice capture and intelligent document processing.
- Automated coding and categorisation using machine learning.
- Optical character recognition and data extraction accuracy.
- Exception routing and human-in-the-loop design.
- Reconciliation automation and matching rules.
- Journal entry preparation and review with AI support.
- Workshop: designing an automated invoice processing workflow.

Day 3: AI for Analysis, Forecasting, and Reporting

- Financial forecasting with machine learning models.
- Variance analysis and anomaly detection techniques.
- Natural language processing for contracts and disclosures.
- Generative AI for report drafting and narrative writing.
- Prompt design for reliable financial outputs.
- Testing and validating AI-generated analysis.
- Workshop: building an AI-assisted variance analysis routine.

Day 4: Risk, Ethics, and Data Governance

- Data privacy and confidentiality in AI use.
- Information security risks and model access control.
- Bias, fairness, and reliability assessment.
- Hallucination, fabricated figures, and verification protocols.

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- Regulatory and professional ethics considerations.
- Vendor and third-party AI assessment.
- Workshop: building an AI risk and control checklist.

Day 5: Implementation, Productivity, and Governance

- Building AI into daily finance workflows.
- Productivity measurement and time release analysis.
- Training, change management, and capability building.
- Documentation and audit trail for AI-assisted work.
- Governance framework and approval processes.
- Continuous review and tool monitoring.
- Course review, assessment, and action planning.

Conclusion

By successfully completing Artificial Intelligence (AI) for Accounting and Finance Professionals, participants will gain a thorough understanding of AI foundations, accounting automation and document processing, AI-assisted forecasting and reporting, AI risk, ethics and data governance, and implementation and productivity management. They will also acquire practical skills in finance task suitability assessment and AI tool application, accounting automation and document processing design, AI-assisted analysis, forecasting and reporting, and AI risk assessment and governance. In addition, the course prepares them to use AI responsibly while improving accuracy and efficiency. Gentex Training Center delivers this programme with a strong focus on applied practice and responsible AI adoption.

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FAQs for Artificial Intelligence (AI) for Accounting and Finance Professionals course

Q1 What is the "Artificial Intelligence (AI) for Accounting and Finance Professionals" course about?

It is a five-day programme on using AI productively in finance and accounting work. It covers AI foundations, accounting automation and document processing, forecasting and anomaly detection, generative AI for reporting, AI risk and ethics, data governance, and implementation and productivity management.

Q2 What are the key benefits of the "Artificial Intelligence (AI) for Accounting and Finance Professionals" course?

Participants cut routine workload and raise accuracy at the same time. The course improves invoice processing and coding efficiency, speeds reconciliation and exception handling, strengthens forecasting and variance analysis, adds reliable AI drafting for reports, lowers the risk of acting on unverified AI output, and builds governance that keeps AI use controlled.

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Q3 What skills will I gain from the "Artificial Intelligence (AI) for Accounting and Finance Professionals" course?

Participants gain finance task suitability assessment and AI tool application, accounting automation and document processing design, AI-assisted analysis, forecasting and reporting, and AI risk assessment and governance. These four skills cover the practical core of AI use in accounting and finance.

Q4 What tools, methods, or standards are covered in the "Artificial Intelligence (AI) for Accounting and Finance Professionals" course?

The course covers AI, machine learning and generative AI concepts, task suitability assessment across rule-based, pattern-based and judgement tasks, data preparation and quality requirements, finance AI tool categories, hallucination and verification protocols, intelligent document processing, optical character recognition and data extraction accuracy, automated coding and categorisation, exception routing and human-in-the-loop design, reconciliation automation and matching rules, AI-supported journal entry preparation, machine learning forecasting models, variance anomaly detection, natural language processing for contracts and disclosures, generative AI report drafting, prompt design for financial outputs, output validation and testing, data privacy and confidentiality requirements, information security and model access control, bias and fairness assessment, professional ethics and regulatory considerations, third-party AI vendor assessment, workflow integration, productivity measurement, documentation and audit trail design, and AI governance frameworks.

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Q5 How is the "Artificial Intelligence (AI) for Accounting and Finance Professionals" course applied in real-world practice?

Participants apply the methods to their own finance workflows. They assess which tasks suit AI, design document processing and coding automation, set up reconciliation matching with exception rules, use AI for forecasting and variance analysis, draft report narratives with verification steps, build risk and control checklists for AI use, document AI-assisted work for audit, and measure productivity gains. Many leave with an AI suitability map, a prompt library, and an AI governance checklist ready to use.