

ARTIFICIAL INTELLIGENCE FOR FINANCIAL ANALYSIS



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TRAINING CENTER



Introduction

Financial analysis is evolving fast, and artificial intelligence now plays a central role in how professionals read markets, assess risk, and support business decisions. This course introduces participants to practical AI tools and techniques used in modern financial analysis. Participants explore how machine learning models process financial data, detect patterns, and generate forecasts. Furthermore, the course connects AI concepts to real financial tasks such as valuation, credit scoring, and portfolio review. As a result, participants leave with a clear, hands-on understanding of how AI supports smarter, faster financial decisions. Gentex Training Center designed this program to build practical, job-ready skills for finance professionals working in data-driven environments.

Artificial Intelligence for Financial Analysis Course Objectives

By the end of this course, participants will be able to:

- Explain core AI and machine learning concepts relevant to finance
- Identify how AI tools support financial forecasting and analysis
- Apply AI-based techniques to evaluate financial statements
- Use AI models to assess credit and investment risk
- Interpret AI-generated financial reports and dashboards
- Recognize common data quality issues that affect AI outputs
- Apply AI tools to detect fraud and unusual transactions
- Evaluate the strengths and limits of AI in financial decision-making
- Build a basic AI-supported financial forecasting model
- Align AI outputs with sound financial judgment and compliance standards



Course Methodology

- Interactive instructor-led sessions with real financial examples
- Hands-on exercises using AI and data analysis tools
- Case studies from banking, investment, and corporate finance
- Group discussions to compare traditional and AI-based approaches
- Practical templates and checklists for on-the-job use
- Continuous feedback throughout each session

Who Should Take This Course

- Financial analysts and senior analysts
- Investment and portfolio analysts
- Risk and credit analysts
- Finance managers and controllers
- Banking and corporate finance professionals
- Data analysts working within finance teams
- Accounting professionals moving toward analytical roles

Artificial Intelligence for Financial Analysis Course Outlines

Day 1: Foundations of AI in Finance

- Overview of artificial intelligence and machine learning
- Key differences between traditional and AI-based analysis
- Common AI applications across the finance sector

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- Data types used in financial AI models
- Introduction to financial datasets and data sources
- Ethical and regulatory considerations for AI use
- Setting up tools used throughout the course

Day 2: AI Tools for Financial Data Analysis

- Data cleaning and preparation for AI models
- Identifying patterns and trends in financial data
- Using AI tools for ratio and trend analysis
- Automating repetitive financial analysis tasks
- Visualizing financial data with AI-supported dashboards
- Common errors in AI-driven data interpretation
- Practical exercise using sample financial data

Day 3: AI for Forecasting and Valuation

- Basics of predictive modeling in finance
- Building simple AI-supported forecasting models
- Applying AI to revenue and cost projections
- Using AI in company valuation techniques
- Comparing AI forecasts with traditional methods
- Identifying bias and limitations in forecasting models
- Group exercise: building a short-term forecast

Day 4: AI in Risk and Credit Analysis

- Role of AI in credit scoring models



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- Assessing borrower and counterparty risk with AI
- Detecting early warning signs using AI tools
- AI applications in fraud detection
- Reviewing AI-generated risk reports
- Balancing AI insights with human judgment
- Case study: risk assessment using AI outputs

Day 5: Applying AI Responsibly in Financial Decisions

- Integrating AI outputs into financial reports
- Communicating AI-based findings to stakeholders
- Governance and compliance considerations for AI use
- Building a checklist for responsible AI adoption
- Reviewing course tools and templates
- Final case study combining all course concepts
- Course wrap-up and personal action plan

Conclusion

By successfully completing Artificial Intelligence for Financial Analysis, participants will have acquired practical knowledge of how AI supports financial data analysis, forecasting, risk assessment, and decision-making. In addition, participants will understand how to apply AI tools responsibly alongside sound financial judgment. Gentex Training Center remains committed to equipping finance professionals with practical, up-to-date skills for a data-driven industry.





FAQs

Q1 What is the "Artificial Intelligence for Financial Analysis" course about?

The Artificial Intelligence for Financial Analysis course explores how artificial intelligence and machine learning support modern financial analysis. It covers financial data analysis, forecasting, valuation, credit scoring, risk assessment, fraud detection, AI-generated reports and dashboards, and responsible use of AI in financial decision-making.

Q2 What are the key benefits of the "Artificial Intelligence for Financial Analysis" course?

The course helps participants use AI to analyze financial data, identify patterns, improve forecasting, assess credit and investment risks, and detect unusual transactions. It also develops the ability to interpret AI-generated outputs, recognize data quality issues, and combine AI insights with sound financial judgment.

Q3 What skills will I gain from the "Artificial Intelligence for Financial Analysis" course?

Participants will develop four key skills: AI-Assisted Financial Analysis, Financial Forecasting and Valuation, Credit and Investment Risk Assessment, and Fraud Detection and Responsible AI Application. These skills support data-driven analysis, predictive modeling, risk evaluation, fraud identification, and responsible integration of AI into financial decisions.



Q4 What tools, methods, or standards are covered in the "Artificial Intelligence for Financial Analysis" course?

The course covers AI and machine learning tools for financial data analysis, predictive modeling, AI-supported dashboards, credit scoring models, financial forecasting techniques, company valuation, fraud detection, data preparation, and practical templates and checklists. It also addresses governance, compliance, ethical considerations, and responsible AI adoption.

Q5 How is the "Artificial Intelligence for Financial Analysis" course applied in real-world practice?

The course applies AI to practical finance tasks through banking, investment, and corporate finance case studies. Participants work with sample financial data, build short-term forecasting models, review AI-generated risk reports, assess financial outputs, and practice integrating AI findings into reports while maintaining human judgment and compliance.