Advanced Generative AI for Finance Workflows Training Course

21 – 25 June 2027
San Diego

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Ref: 1151_185030 **Date:** 21 – 25 June 2027 **Location:** San Diego **Fees:** 14000 Euro

Overview

Advanced Generative AI for Finance Workflows Training Course is a one-week course for finance leaders, controllers, FP&A teams, treasury professionals, investment analysts, and transformation teams who leave with a Governed Finance AI Workflow Pack. Participants apply generative AI finance workflow design, finance prompt engineering, financial document review with AI, AI-assisted forecasting controls, and finance AI output evaluation to traceable work. The course keeps human authority over financial decisions. Agile Leaders Training Center develops governed generative AI use in finance.

Who Should Attend

- Teams responsible for financial planning, analysis, and management reporting
- Functions responsible for controllership, close, and financial document review
- Treasury teams responsible for liquidity analysis and cash forecasting
- Investment teams responsible for research, screening, and decision support
- Transformation teams responsible for finance technology and operating controls

The course assumes participants can interpret financial models, reports, and control requirements, and it leaves out model coding and autonomous financial decision-making.

Departments and Industries

The course supports departments and industries that use financial evidence, narrative, and forecasts in controlled decisions.

- Corporate finance, FP&A, controllership, and treasury
- Banking, insurance, investment, and asset management
- Manufacturing, retail, logistics, and energy finance
- Audit support, tax operations, and financial advisory
- Finance transformation, data governance, and internal controls

Learning Objectives

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

- Evaluate finance use cases and define accountable boundaries
- Build structured prompts and grounded workflow instructions
- Apply LLMs to documents, analysis, reports, and forecasts
- Measure accuracy, traceability, consistency, and control performance
- Diagnose privacy, model, and third-party risks
- Build a governed implementation plan with human review

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Course Agenda

Day 1: Finance Use Cases and Boundaries

- Finance LLM Use-Case Inventory
- Value, Feasibility, and Risk Screening Matrix
- Human Authority and Decision Boundary Map
- Financial Data Classification Register
- NIST AI RMF Govern-Map Control Canvas

Day 2: Prompt and Workflow Design

- Finance Prompt Specification Template
- Context, Constraint, and Output Schema Method
- Approved-Source Grounding Checklist
- Document Extraction and Review Workflow
- Prompt Version and Change Log

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Day 3: Analysis, Reporting, and Forecasting

- Variance Commentary Evidence Table
- Management Report Drafting Flow
- Cash Forecast Assumption Review Grid
- Scenario Narrative Consistency Test
- Investment Research Claim Verification Sheet

Day 4: Evaluation, Controls, and Deployment

- Finance AI Test Case Library
- Accuracy and Traceability Evaluation Scorecard
- Hallucination and Exception Escalation Protocol
- Privacy and Third-Party Risk Checklist
- NIST AI RMF Measure-Manage Review Gate

Day 5: Governed Finance AI Practice

- Exercise: Screen a Finance LLM Use Case
- Exercise: Build and Test a Grounded Prompt
- Exercise: Verify a Financial Report Draft
- Exercise: Review Forecast and Privacy Controls
- Capstone Exercise: Governed Finance AI Workflow Pack

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Practical Exercises

The course uses suggested activities to convert finance tasks into controlled, reviewable AI-supported workflows.

- Suggested activity: classify data and assign human authority for a finance use case
- Suggested activity: build a grounded prompt for variance analysis and test its outputs
- Suggested activity: verify claims in an AI-assisted management report
- Suggested activity: design evaluation, privacy, escalation, and deployment controls

FAQs

Who suits advanced generative AI for finance workflows training?

Finance leaders, controllers, FP&A teams, treasury professionals, investment analysts, and transformation teams suit the training. Participants should already interpret financial models, reports, and controls.

How does generative AI for finance workflows differ from general AI training?

Generative AI for finance workflows focuses on financial evidence, prompts, documents, forecasts, evaluation, privacy, and accountable review. General AI training usually focuses on broader concepts and tools.

How can LLMs support financial analysis without replacing judgment?

LLMs can organize evidence, draft commentary, compare scenarios, and surface questions while named finance professionals verify sources, challenge assumptions, and retain decision authority.

How should finance teams evaluate generative AI outputs?

Finance teams should test outputs against approved sources and expected results, record accuracy and traceability, review exceptions, and define acceptance and escalation criteria.

What controls protect confidential financial data in generative AI workflows?

Data classification, approved tools, access limits, minimized inputs, retention rules, third-party review, output verification, and incident escalation protect confidential financial data.

Conclusion

Participants take back a Governed Finance AI Workflow Pack containing use-case screens, prompt specifications, grounding checks, test cases, evaluation scorecards, risk controls, and a deployment gate. The pack changes informal experimentation into documented finance workflows. It helps teams apply generative AI while preserving evidence, confidentiality, review, and human authority.