

# CERTIFIED AI FINANCIAL ANALYST

## COURSE OVERVIEW

The Certified AI Financial Analyst program introduces a modern way of working with financial data by combining solid analytical skills with the power of Microsoft Copilot AI. The course focuses on how AI can simplify financial tasks, improve accuracy, and uncover insights that are often missed in traditional analysis. Participants learn how Copilot supports key areas such as reviewing financial statements, analyzing results, building ratios, and assessing performance. The program keeps the learning experience practical and realistic, helping professionals understand how to use Copilot as a dependable tool that enhances judgment, clarity, and confidence in financial decision-making.

## TARGET COMPETENCIES

- Introduction to Financial Statements with Copilot AI
- Income Statement Analysis with Copilot AI
- Balance Sheet Analysis with Copilot AI
- Cash Flow Analysis with Copilot AI
- Financial Ratio Analysis with Copilot
- Performance Evaluation and Trend Analysis with Copilot AI
- Business Decision-Making with Copilot AI

## COURSE OBJECTIVES

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

- Analyze financial statements using Copilot tools in Excel.
- Simplify income, balance sheet, and cash flow reviews through automation.
- Generate AI-assisted ratios and performance summaries.
- Identify financial patterns and trends using Copilot insights.
- Support business decisions with AI-driven financial analysis.

## TARGET AUDIENCE

- Financial analysts and FP&A teams
- Management accountants and controllers
- Finance managers and decision makers
- Business analysts and corporate planners
- Professionals adopting AI in finance

# **COURSE METHODOLOGY**

Interactive demonstrations, hands-on exercises, and guided analysis using Microsoft Copilot AI within Excel and on real financial datasets.

## **COURSE OUTLINE**

### **INTRODUCTION TO FINANCIAL STATEMENTS WITH COPILOT AI**

- Overview of financial statements supported by Copilot tools
- Automated preparation and review of statement components
- AI assistance in organizing revenue and expense data
- Quick summaries of financial results and key indicators
- Connection between income, balance sheet, and cash flow data

### **INCOME STATEMENT ANALYSIS WITH COPILOT AI**

- AI support for reviewing revenues and costs
- Simplified COGS and expense breakdowns
- Quick profitability and margin calculations
- Summary of operating and non-operating performance
- Case practice using AI-generated income statement insights

### **BALANCE SHEET ANALYSIS WITH COPILOT AI**

- Structure of assets, liabilities, and equity in Excel Copilot
- Automatic classification of current vs. non-current items
- Depreciation and amortization schedules assisted by AI
- Debt and equity structure evaluation
- AI-generated overview of company position and solvency

### **CASH FLOW ANALYSIS WITH COPILOT AI**

- Breakdown of operating, investing, and financing cash flows
- Conversion of profit data into cash insights using Copilot
- Simplified preparation of direct and indirect methods
- Cash movement tracking and reconciliation
- Hands-on creation of a cash flow statement with AI support

### **FINANCIAL RATIO ANALYSIS WITH COPILOT AI**

- Automatic ratio generation and interpretation
- Key ratio groups: liquidity, profitability, solvency, and market
- Integration of ratios into visual dashboards
- Comparison of results across periods
- AI-assisted performance summary reports

### **PERFORMANCE EVALUATION AND TREND ANALYSIS WITH COPILOT AI**

- Comparative and common-size analysis supported by Copilot
- Automatic preparation of horizontal and vertical analysis
- Detection of major performance shifts across time
- Highlighting of unusual or inconsistent items
- Practical application using sample company data

### **BUSINESS DECISION-MAKING WITH COPILOT AI**

- AI integration in cost and investment analysis
- Evaluation of capital projects using Copilot models
- Simplified valuation and return calculations
- Risk overview and scenario review with Copilot tools
- End-to-end financial analysis case study

To register or for complete course information

Office: +971 4 430 8394 | WhatsApp: +971 50 454 9895 | Email: [courses@viftraining.com](mailto:courses@viftraining.com)

web: [www.viftraining.com](http://www.viftraining.com)