



Financial Modeling

with Generative AI

Starting from 20th
June 2025

Time
11:00am to 1:00 pm

Days: Wednesday
and Friday

6 sessions

Course Objective:

The objective of this course is to equip finance professionals, analysts, and aspiring data-driven decision-makers with practical skills to integrate Generative AI into financial modeling processes. Through a blend of hands-on activities, real-world use cases, and cutting-edge tools, learners will gain the ability to build, optimize, and forecast financial models using AI. By the end of the course, participants will be proficient in applying generative AI techniques for predictive analytics, scenario analysis, financial forecasting, risk assessment, and model optimization, empowering them to make smarter, faster, and more informed financial decisions.

Who Should Attend:

- Finance professionals using models
- Business and strategy consultants
- Data analysts exploring AI tools
- MBA students and finance grads
- Startup founders and entrepreneurs
- Investment and budgeting teams
- Anyone curious about AI in finance

INVESTMENT: PKR 10,000

Trainer
**Raheel
Rupani**

Certified Microsoft Excel
and Microsoft BI trainer



COURSE OUTLINE:

Foundations of Generative AI in Finance

- Understanding Generative AI vs Traditional AI
- Core Concepts of Prompt Engineering
- Exploring Generative AI Fundamentals

Introduction to Financial Modeling

- Basics of Financial Modeling
- Key Stages in the Modeling Process and the Role of AI
- Leveraging Generative AI for Financial Data
- Financial Modeling Overview

Exploring GenAI Tools for Finance

- Overview of Essential Tools: ChatGPT, Copilot, and More
- Challenges and Limitations of Generative AI Tools
- Selecting the Right AI Tool: Factors and Evaluation Framework
- Applying Tools in Financial Modeling

Predictive Modeling with Generative AI

- Fundamentals of Predictive Modeling
- How Generative AI Enhances Forecasting
- Revenue and Expense Growth Predictions with AI
- Basics of Predictive Modeling

Advanced GenAI Tools in Practice

- Overview of Advanced AI Tools
- Assessing the Accuracy of Predictive Models
- Applying Advanced Tools in Financial Modeling



COURSE OUTLINE:

Applied Use Cases in Financial Modeling

- Case Study: Optimizing Investment Portfolios with AI
- Budget Forecasting Using Business Models and Revenue Trends
- Designing Decision Tables and Visual Dashboards from AI Outputs
- World Applications of AI in Finance

Assumption-Driven Financial Forecasting

- Introduction and Welcome
- Conducting Market Research and Formulating Assumptions
- Estimating Expenses Based on Revenue Drivers
- Building Input Templates and Key Metrics
- Assumption Building in Financial Models

Deep Dive into Financial Forecasting

- Segment-Based Revenue Forecasting
- Identifying and Analyzing Expense Trends
- Constructing Cash Flow Statements and Calculating IRR
- Creating a Detailed Financial Forecast

Tools can be used to:

- Excel
- Python
- LLMs
- Copilot VS Code
- Google Colab