



The WallStreet®
School | INDIA
SINCE 2009

**BUILD THE
SKILLS TODAY
THAT FINANCE
WILL DEMAND
TOMORROW.**

AI FOR FINANCE

Course Brochure





Finance is no longer about recording the past. It's about predicting the future. AI is not replacing finance professionals. It's reinventing them. The transformation has already begun. If you're not learning AI, you're already behind.

Abhishek Shah | CEO | The WallStreet School



TO AI OR NOT TO AI?

AI is not the future of finance. It's the now. It's turning spreadsheets into smart moves and number crunchers into strategy leaders. This isn't a trend. It's a takeover. If you're not in the game yet, you're already playing catch-up.



According to Deloitte, 73 percent of finance leaders are already adopting AI to gain speed, accuracy, and foresight. Today, AI is being used for fraud detection, automated reconciliations, forecasting, and real-time reporting.

In the near future, it will drive autonomous audits, intelligent scenario planning, and AI-assisted investment decisions. Early adopters are not just keeping up. They are pulling ahead. In this new landscape, the advantage will belong to those who act now, not later.



AI. FINANCE. FUTURE.

Global Finance in Action

See how global leaders like JPMorgan, Razorpay, HDFC Bank, and Bank of America use AI to forecast sales, detect fraud, automate reports, and more. Each caselet is paired with practical tools and examples you can apply in your own workflow.

Workplace-Ready Tools

Use tools like ChatGPT, Excel with AI, Google Sheets, NotebookLM, Gamma, Claude and more. Learn how to speed up pitch decks, automate reconciliations, summarize reports, and make faster, data-driven decisions.

Capstone with Real Value

Complete a project that fits your goals, summarize annual reports, build an investor deck, automate MIS, or design a personal finance tracker. Submit your work and earn a certificate with a bonus badge.

Made for Finance Professionals

This course is built for CAs, CFAs, MBAs, analysts, and finance aspirants who want to stay relevant without getting buried in code. You'll learn how to think, prompt, and work with AI—not become a programmer.

Caselets, Demos, Practice

Every module includes a real caselet, a hands-on demo, and a finance-specific tool walkthrough. You'll build skills by solving problems that professionals face every day in real jobs.

Be the Early Mover

AI is set to transform finance with over ₹8 lakh crore in projected investment by 2027. Early adopters are already taking the lead. This course gives you the edge to be one of them.



AI + FINANCE =
THE FUTURE.
YOU IN?



AI for Finance is here to stay. Companies are hiring smarter, paying more, and moving faster. Adapt now or risk becoming irrelevant.

Deloitte.	KPMG	Goldman Sachs	McKinsey & Company	Grant Thornton
kotak	IIFL FINANCE	J.P.Morgan	SAMHI SMART HOTEL INVESTMENTS	HSBC
NIRAGA	Morgan Stanley	EVALUESERVE	NOMURA	ICICI BANK
genpact	INVESTORS Consulting Private Limited	AYE [आय]	Churchgate Partners	enfusion
Smart Cube	EQUITY360	ADITYA BIRLA FINANCE	pwc	ZIEL
Deutsche Bank	Bank of America.	NOMURA	MarshMcLennan	FORTRESS
AURUM Trust is Everything	AMERICAN EXPRESS	visible alpha	THOMSON REUTERS	SG Analytics Life's Possible.
resurgentindia B2B, B2C, B2B2C, B2B2C, B2B2C	MCube	ICRA A MANDALAY GROUP COMPANY SERVICES COMPANY	FitchRatings	Edelweiss Ideas create, values protect
BNP PARIBAS	BASIC	TresVista Catalyzing Your Impact	INDmoney® Super Money App	AVANSE AVANSE SERVICES
SBI Securities Investment our Trust, Done	BODHI TREE	MORNINGSTAR®	Shivalaya Construction	SitusAMC
Knight Frank	DRIP/c	JM FINANCIAL	VERITY Knowledge Solutions	AngelOne
ACUITY KNOWLEDGE PARTNERS	MADISON STREET CAPITAL	CBRE	Xdatakatalyst ventures	TURNAROUND®
AlphaValue Consulting	redbrick	ACQUEST	S&P Global Ratings	FAB ANALYTICS
Infra Infrastructure Development Solutions	VALOREM ADVISORS	REALVAL	KNAV PARTNERS BEYOND BOUNDARIES	Infinia.Solar
DECiMAL POINT Innovative Data & Research Solutions	RESTACK	rocsearch advantage through intelligence	Mintifi	GALLAGHER & MOHAN Real Service Through Global Systems
PLANIFY	MAYHEM MUMBAI	NEWMARK	amazon	EY



ABOUT AI FOR FINANCE

The WallStreet School Lens

We don't just teach AI, we teach how finance professionals can use it to drive outcomes. Our approach blends financial depth with tool intelligence, ensuring you not only understand AI but also know exactly where it fits in your daily workflow.

AI in Core Finance Functions

You'll learn how AI transforms audits, valuations, forecasting, MIS, research, and reporting—not with theory, but through action. We map every tool to real finance use cases, so you see results where it matters most.

Adaptable for Every Role

Whether you're in investment banking, FP&A, equity research, or corporate finance, the program adapts to your workflow. Our modular structure helps you focus on what's most relevant to your current or desired role.

Mindset Before Toolset

AI is only as effective as the professional using it. That's why we train you to ask better questions, frame problems clearly, and approach AI as a thinking partner. This mindset shift is what separates users from leaders.

Speak Finance Smarter

Today's finance roles demand clarity in reporting and storytelling. We show you how AI enhances not just analysis but also communication, be it board decks, investor summaries, or decision memos.

Beyond the Classroom

The course goes beyond completion. We equip you with AI workflows, prompt banks, and toolkits you can take back to work. What you build here continues to evolve with your career, long after the modules are done.



OUR MENTORS

Dhawal Singh Panwar is an Automation & AI Consultant and Workflow Strategist who helps businesses eliminate inefficiencies and build scalable internal systems. With experience across industries like e-commerce, education, HR, and sales, he has led initiatives for teams at StoryXpress, Masters' Union, The WallStreet School, and more.

His toolkit spans GenAI platforms (OpenAI, Anthropic), no-code tools (Zapier, n8n, Replit), and Python-based automations—delivering solutions from placement workflow bots to AI copilots trained on internal SOPs.

Currently pursuing an Executive MBA at Masters' Union, Dhawal blends technical depth with a business-first mindset to help teams move faster, reduce manual effort, and operate smarter.

DHAWAL SINGH PANWAR
Automation & AI Consultant,
Founder - DSP Solves



OUR FOUNDERS

With 21+ years of experience in investment banking, consultancy, and advisory roles, Himanshu Jain is a seasoned professional with a rich background in strategic consultancy, valuation, project financing, and private equity. Having worked with industry giants like McKinsey, Moody's, and PwC, he co-founded ARC Financial Services, an investment bank.

In 2009, he also co-founded The WallStreet School to train and equip aspiring talent, analysts, and associates with essential skills for success in finance-related sectors. His dedication to the field is evident in the impactful training provided by The Wallstreet School, contributing to the professional growth of many.

HIMANSHU JAIN
CoFounder
TWSS



OUR FOUNDERS

With over 21+ years of expertise in investment banking, consultancy, and advisory roles, Manoj Goel is a seasoned professional with a robust background in strategic consultancy, valuation, project financing, and private equity. His extensive experience includes working with prestigious firms such as Goldman Sachs and Bennett Coleman and Co. Co-founding ARC Financial Services, a highly successful investment banking firm, reflects his impactful contributions to the industry.

In 2009, Manoj also co-founded The WallStreet School, aiming to train, nurture, and equip fresh talent, analysts, and associates with the essential skills required in investment banking, equity research, consulting, and related sectors.

Manoj Goel
CoFounder
TWSS



CURRICULUM OVERVIEW

Module 0

AI Essentials for Finance

- What is AI and how it differs from automation
- Types of AI: Narrow, General, Generative
- Understanding inputs, prompts, and AI's limitations
- Analogy: AI as your junior analyst
- Fun quiz and hands-on: Spot AI in everyday life

Module 2

AI in Excel & Presentations

- Forecasting and English-based queries in Excel
- AI assistants for Excel and Sheets
- AI deck-building with Gamma.ai and Napkin.ai
- Caselet: EY board presentations, Indian CFO dashboards
- Hands-on: Create a business deck from raw data

Module 4

Forecasting, Planning & Risk

- Revenue and cash flow forecasting using GPT
- Credit risk scoring and fraud prediction
- Explainable AI in finance decisions
- Caselets: Coca-Cola, Indian D2C brand forecasting
- Hands-on: Forecast sales using historical data

Module 1

AI Foundations in Finance

- AI, ML, DL simplified for finance professionals
- Common myths vs. realities
- Case studies: Deloitte (India), PwC (Global)
- Activity: Spot one task AI can automate in your workflow
- Tool demo: ChatGPT, Excel, Automation walkthrough

Module 3

Preparing Financial Data for AI

- Structured vs. unstructured data
- Data cleaning principles for smarter AI use
- Caselets: Invoice scanning, TurboTax automation
- Tools: NotebookLM, Claude, Gemini
- Hands-on: Analyze transaction logs with AI

Module 5

AI for Fraud & Anomaly Detection

- Pattern recognition and anomaly spotting
- Detect fake transactions or outliers in financial records
- Caselets: HDFC Bank, Mastercard
- Hands-on: Use AI to flag suspicious entries in Excel



CURRICULUM OVERVIEW

Module 6

AI for Financial Communication

- Summarize annual reports and PDFs using AI
- Sentiment analysis for investor letters and budgets
- Caselets: Zerodha (policy docs), JPMorgan (earnings calls)
- Hands-on: Build a summary or pitch using ChatGPT and Screener data

Module 7

Risk Management with AI

- Building rules for early warning signals
- GPT logic for underwriting and risk simulation
- Caselets: Razorpay, Stripe Radar
- Hands-on: Create a simple fraud detection logic using Sheets and Zapier

Module 8

AI for Customer Support & Copilots

- Chatbots and AI-driven support systems in finance
- Auto-responses for invoices, email summaries
- Caselets: Eva by HDFC, Erica by Bank of America
- Hands-on: Build a basic chatbot flow using no-code tools

Module 9

AI Strategy and No-Code Tools

- Trends: SLMs, Chatbots, Prompt Engineering
- Ethics, audit trails, bias in outputs
- Tools: Zapier, Replit, NotebookLM
- Caselets: KPMG + Copilot, BlackRock's Aladdin
- Final challenge: Design a relevant use case for your domain



ADVANTAGES OF CHOOSING AI FOR FINANCE



Practical AI Skills for Real Finance Roles

Learn how to use tools like ChatGPT, Gemini, Excel AI with Copilot to automate reports, forecast numbers, detect anomalies, and build sharper insights—without needing to code.



Built for Finance Professionals and Aspirants

Whether you're a CA, MBA, CFA, analyst, or student, this program maps directly to your workflows in audit, FP&A, MIS, valuations, and investment banking.



Global Caselets, Tool Demos, and Capstone Projects

Train through real-world case studies from companies like JPMorgan and Razorpay. Complete a portfolio-worthy capstone and earn a TWSS certificate that sets you apart.



FAQS

1. Do I need to know coding to take this course?

Not at all. This course is built for finance professionals and students. You will learn how to use AI tools through guided prompts, not programming.

2. Who should enroll in this course?

CAs, CFAs, MBAs, finance analysts, investment bankers, business consultants, MIS professionals, and final-year students who want to gain a competitive edge in the finance industry.

3. What tools will I learn to use?

You will gain hands-on experience with ChatGPT, Excel with Copilot, Google Sheets with Gemini, SlidesAI, Claude, Gamma, NotebookLM, and automation platforms like Zapier and Replit.

4. Is this course theoretical or practical?

It is completely practical. Each module includes a real-world caselet, a hands-on activity, and a demo of tools used in day-to-day finance work.

5. How long is the course and what is the format?

The course includes 10 core modules (2 hours each), along with optional capstone projects, bonus caselets, and live tool demos. Everything is designed to fit into your professional routine.

6. Will I receive a certificate?

Yes. You will receive a certificate upon completion of all modules. If you submit a capstone project, you will also earn a bonus badge from The WallStreet School.

7. How will this course help my career?

You will learn how to use AI tools to work faster, communicate better, and think strategically. These are the exact skills employers are looking for in today's finance professionals.

8. Are global finance use cases covered?

Yes. The course includes global examples from JPMorgan, BlackRock, Mastercard, Stripe, and more, in addition to Indian firms like Razorpay, Zerodha, and HDFC Bank.

9. Is this course relevant for entry-level finance roles?

Absolutely. Whether you are entering the industry or already working in finance, the ability to apply AI in your workflow gives you a clear advantage.

10. What kind of projects will I work on?

Capstone projects include creating AI-powered investor decks, automating MIS, summarizing annual reports, building personal finance trackers, and more—tailored to your role and goals.



NEXT STEP



Got questions about AI for Finance?
Chat with our Student Success
Manager for free career guidance,
pricing info, or anything else. Just hit
us up on the number below!

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