

AI Foundations for Finance Professionals

裝備未來
FutureSkills

This 3-hour introductory course equips finance professionals with a solid understanding of artificial intelligence fundamentals and how to apply AI tools to enhance daily financial workflows.

No prior technical or programming experience is required.

Level: Foundation

Programme code	P0000355
Date and time	7 Oct, 2026 (Wed) 14:30 – 17:30 (3 Hours)
Venue	1/F, HKPC Building, 78 Tat Chee Avenue, Kowloon Tong
Medium	Cantonese, supplemented with English terminology
Course fee	HK\$1,500/*HK\$1,350 for early-bird/ group enrolment of two or more people

Learning Outcomes

- ✓ Explain core AI and generative AI concepts in plain language
- ✓ Apply prompt engineering techniques to financial tasks
- ✓ Use ChatGPT, Gemini, and Claude for financial analysis and content generation
- ✓ Identify ethical and regulatory considerations when using AI in finance

Target Audience

Finance professionals, accountants, auditors, banking staff, insurance practitioners, and anyone working in financial services who wants to begin their AI journey.

Course Outline

Lesson	Topics	AI Tools
1	Introduction to AI & Generative AI: What is AI, machine learning, and large language models (LLMs)? How do they work?	Market AI Tools, e.g. ChatGPT, Gemini
2	AI in the Financial Services Landscape: Current applications, industry trends, and the future of AI in banking, insurance, and asset management	Industry case studies
3	Prompt Engineering for Finance: Crafting effective prompts for financial analysis, report drafting, email composition, and meeting summarisation	Market AI Tools, e.g. ChatGPT, Gemini
4	Hands-on Workshop: Using AI to analyse financial statements, generate executive summaries, and draft client communications	Market AI Tools, e.g. ChatGPT, Gemini
5	AI Ethics, Data Privacy & Responsible Use: Understanding bias, data security, regulatory considerations, and organisational AI governance	Discussion & frameworks
6	Practical Exercise & Wrap-Up: Participants complete a guided exercise applying AI tools to a real-world finance scenario	All tools covered

Trainer Information

Ms. Winnie Leung, MBA

Co-Founder, SkillSpark Limited, Founder and CEO, WYNI Technology Limited

Winnie Leung is a serial tech entrepreneur with over 10 years of experience in technology, specializing in AI, machine learning, and data science. As Founder and CEO of multiple AI-driven ventures, she has led transformative projects in natural language processing, predictive analytics, and scalable AI systems for global enterprises.

Linkedin: <https://www.linkedin.com/in/winnieleungwingyin/>

Enrolment method

- Scan the QR code to complete the enrolment and payment online
- Should you have any enquiries or information needed, please feel free to contact us. Thank you.

