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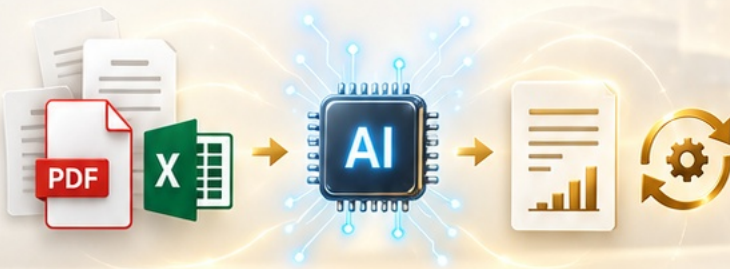
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PYTHON + AI FOR FINANCE WORKFLOWS

Document Reading, AI Summaries,
Finance Agents & Smart Automation

Finance teams handle reports, reconciliations, emails, PDFs and spreadsheets every month. This course shows how Python and AI can work together to read finance documents, summarise information, analyse data and support practical automation workflows.



Read



Summarise



Analyse



Automate

BETTER
INSIGHTS
BRIGHTER
DECISIONS

DATA
TO
DECISIONS
TO
IMPACT

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SKILLS
FOR A SMARTER
FINANCE TOMORROW



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WHY PYTHON + AI IN FINANCE?

Finance Work Is Changing

Modern finance teams need more than manual Excel work. They need faster review, better control and smarter analysis across multiple files and formats.

BETTER
INSIGHTS
BRIGHTER
DECISIONS



Document reading

Extract useful information from PDFs, reports, emails and Excel files.



AI summaries

Convert long finance documents into short, structured summaries.



Smart analysis

Identify trends, exceptions, movements and unusual balances.



Workflow automation

Reduce repetitive manual steps in monthly finance processes.

DATA
TO
DECISIONS
TO
IMPACT



SKILLS
FOR A SMARTER
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Document Reading & AI Summaries

From Finance Files to Structured Insights

Finance information comes from many sources — Excel files, PDFs, reports, emails and system exports. This module shows how to use Python and AI to read, understand and organise this information into structured, finance-ready outputs.



Turn scattered finance documents into clear, structured insights.



- Summary
- Key Figures
- Main Points
- Action Items



You will learn how to:

- Read different file formats using Python
- Extract key information from documents
- Generate AI summaries of long reports
- Organise data into structured outputs
- Prepare review-ready finance notes

INPUT Finance Documents



Excel
(XLSX)



PDF
Reports



CSV
Files



Emails



Other
Documents



Python + AI

Read
Extract
Summarise
Structure

OUTPUT Structured Insights



Key
Information



AI
Summaries



Structured
Data



Review
Notes

*Same Files.
Smarter Insights.*

Smart Finance Analysis

Find What Matters. Explain with Confidence.

Once finance data is collected, the next step is to understand what changed, what looks unusual and what needs attention. In this module, you will use Python and AI to perform smart finance analysis and generate meaningful insights with clear explanations.

“AI helps you see the story behind the numbers.”



You will learn how to:



Compare Data

Compare actuals, budgets and prior periods



Detect Exceptions

Identify unusual movements and potential issues



Generate Explanations

Create AI-assisted variance explanations



Improve Data Quality

Highlight missing, duplicate or inconsistent records



Prepare Review Summaries

Create clear notes for finance managers

Analyse Smarter.
Act Faster.

Finance Agents & Automation

Build Workflows That Take Action.

AI becomes more useful when it is connected to repeatable finance workflows. This module introduces finance agents and automation concepts that can support monthly reporting, reconciliations and control checks.



“Smart workflows turn repeated finance steps into controlled, repeatable actions.”



You will learn how to:



Read files from folders or emails



Run validation and exception checks



Prepare summary reports automatically



Create email-ready updates and action lists



Keep logs, error reports and control evidence



Finance Documents



AI Review



Smart Analysis



Automated Actions

*Automate Routine.
Strengthen Control.*



Build Smarter Finance Workflows

From Documents to Decisions — with Python + AI

Python and AI can help finance teams save time, improve review quality and create stronger control over repeated processes. This course is designed for finance professionals who want to move beyond manual work and start building practical, intelligent workflows.

Key Takeaways



Read finance documents faster



Summarise reports with structure



Analyse data with better control



Automate repeated finance tasks



Create workflow outputs for real finance use

Thank You

FOR BEING PART OF THIS JOURNEY

Read • Summarise • Analyse • Automate

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