Ai for Strategic Financial Modeling

Uncover how AI is transforming financial modeling, forecasting, risk, and fraud detection replacing manual tasks with intelligent automation and real time decision making tools.

DATES
12th – 14th
May 2026

VENUE
Dusit Thani Hotel,
Dubai U.A.E.

Mr. David Meow

Managing Partner - Firix Consulting PLT
Managing Director - Via Commerce

COURSE TRAINER

✉ training@corsol.net   🌐 www.corsol.net

Corsol
Corporate Solution

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12th - 14th May 2026 - **Dusit Thani Hotel,** Dubai - U.A.E.

Course Overview

This cutting-edge program equips finance professionals with the strategic advantage of integrating Artificial Intelligence and Machine Learning into Excel driven financial modeling. Over three immersive days, participants explore how Python powered Excel tools revolutionize forecasting, risk analysis, portfolio management, and anomaly detection shifting finance functions from reactive to predictive. From AI fundamentals to advanced supervised and unsupervised learning models, the course enables attendees to automate routine tasks, perform robust predictive analytics, and construct scalable, ethical, and intelligent financial systems. Through hands-on sessions, real-world case studies, and interactive dashboards, participants will master next gen Excel capabilities embedding AI seamlessly into their daily financial workflows. Ideal for financial analysts, risk professionals, investment strategists, C level executives, and tech-savvy finance teams, this program empowers you to future proof your modeling skills and make data-driven decisions faster, smarter, and more accurately.

Key Learning Outcomes

By the end of this 3-day intensive training, participants will be able to:

- **Demystify AI in Finance –** Understand core AI and machine learning principles tailored to financial modeling, with practical applications inside Excel
- **Unlock Excel's AI Power –** Leverage AI-powered Excel functions and integrate Python directly into Excel workflows for real-time financial analysis
- **Automate with Precision –** Build automation pipelines for repetitive financial tasks using Power Query and Python scripts, minimizing errors and saving hours
- **Master Predictive Modeling –** Design and deploy forecasting models using Excel and Python to anticipate trends, assess risks, and drive smarter strategy
- **Apply Supervised & Unsupervised ML –** Implement regression, classification, clustering, and dimensionality reduction inside Excel
- **Enhance Decision Making with Data –** Build dashboards and visual analytics that support executive decisions with AI-driven insights
- **Combat Fraud and Detect Anomalies –** Apply Python-based anomaly detection within Excel for fraud prevention and audit preparedness
- **Scale AI for the Enterprise –** Connect Excel to external data sources and implement large-scale AI-enhanced models with governance and security in mind
- **Embed Ethical AI Practices –** Understand ethical, transparent, and compliant use of AI tools in financial environments

Why You Should Attend?

- **Traditional spreadsheets —** just won't cut it anymore. This course isn't just about upgrading your Excel game; it's about future-proofing your entire finance skillset.
- **AI is reshaping finance —** from forecasting to fraud detection, AI is transforming how financial decisions are made. You'll walk away knowing exactly how to apply it inside Excel, no extra software, no coding chaos.
- **Python in Excel is the game changer —** Microsoft's integration of Python into Excel is revolutionizing financial modeling. Be among the first wave of professionals to use it with confidence.
- **Automate the boring stuff —** reporting, data cleaning, portfolio dashboards. Learn how to automate the repetitive junk and free up hours weekly.
- **Make better, faster decisions —** build predictive models, identify patterns, and bring next-level intelligence into your numbers. Boss moves only.
- **Your career will thank you —** whether you're climbing the ladder, leading a finance team, or breaking into investment strategy, AI expertise is a top-tier differentiator.
- **Hands on, not just theory —** every session is practical. You'll actually build and test models, not just sit through slides.
- **If you're tired of being stuck in legacy —** mode spreadsheets and ready to slay with AI-powered strategy, this training is your green light.

Course Facilitator

David Meow

Managing Partner - Firix Consulting PLT
Managing Director - Via Commerce

David Meow holds a Master of Science in Financial Engineering (World Quant University), an MBA (Heriot Watt University, UK), and an LLM in Commercial & Corporate Law (University of London), along with elite certifications such as CFA, FRM, and CA(M). A globally recognized expert in Ai driven financial modeling, risk management, forensic accounting, and investment analysis, he has consulted for regulators, central banks, Fortune 500 companies, and top financial institutions.

With over 30 years of experience, David has trained executives from Maybank, CIMB, RHB, OCBC, Khazanah Nasional, and Bank Negara Malaysia, shaping Ai driven strategies in finance. His expertise extends to forensic accounting, fraud detection, and regulatory compliance, making him a trusted advisor for capital market regulations. A certified data science professional, he specializes in Ai applications for financial forecasting, risk assessment, and automation.

As a former board member of CFA Malaysia, an FAA accreditation expert, and a published thought leader, David continues to influence global financial strategies. His training ensures participants gain cutting edge Ai insights, hands on applications, and best practices to revolutionize financial decision making.

Clienteles

AFFIN BANK — UOB — KHAZANAH NASIONAL — TABUNG HAJI — KWSP EPF — PNB Permodalan Nasional Berhad — KWAP — OCBC Bank — BANK NEGARA MALAYSIA CENTRAL BANK OF MALAYSIA — AICB — Suruhanjaya Sekuriti Securities Commission Malaysia — Central Provident Fund Board — Maybank — CIMB BANK

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Day 1

Foundations of AI-Enhanced Financial Modeling in Excel with Python

Session 1: Introduction to AI and Machine Learning Concepts in Excel and Python
- Overview of the types of Artificial Intelligence and contemporary AI tools
- Overview of AI-powered features in Excel
- Introduction to Python integration in Excel (Python in Excel)
- Comparison of AI-enhanced Excel+Python vs. traditional Excel modeling

Session 2: Data Management and Preprocessing in Excel with Python Support
- Importing and cleaning financial data in Excel
- Using Python in Excel for advanced data manipulation in Excel
- Feature engineering using Excel functions and Python scripts

Session 3: Predictive Analytics with Excel and Python
- Financial forecasting using Gemini 2.5 Flash (free)/Gemini 2.5 (paid)
- Time series forecasting using Excel's FORECAST functions and Python's statsmodels
- Regression analysis using Python in Excel functions
- Hands-on session: Building a basic predictive model using Excel and Python integration

Session 4: Automating Routine Financial Tasks with Python in Excel
- Files in Folder data extraction using Power Query
- Using Python to enhance data transformation and automation
- **Case study**: Implementing automated reporting systems using Power Query and Python in Excel

Day 2

Advanced AI Techniques in Excel with Python for Financial Modeling

Session 1: Supervised Machine Learning with Python in Excel
- Introduction to supervised learning concepts
- Building and training regression models (e.g., Linear Regression)
- Building and training classification models (e.g., Logistic Regression, Decision Trees)
- Evaluating model performance (metrics, confusion matrix, accuracy)
- Visualizing results in Excel with Seaborn and matplotlib
- Exporting predictions and results back to Excel

Session 2: Unsupervised Machine Learning with Python in Excel
- Introduction to unsupervised learning (clustering, dimensionality reduction)
- Data cleaning and preparation in Excel with pandas
- Implementing clustering algorithms (e.g., K-means, hierarchical clustering)
- Dimensionality reduction (e.g., PCA) and visualization
- Interpreting clusters and principal components
- Visualizing clusters and results in Excel

Session 3: Combined Machine Learning with Python in Excel
- Ensemble method
- Machine Learning Model Validation

Session 4: Natural Language Processing in Excel with Python
- Text analysis using Python's NLTK library in Excel
- Sentiment analysis of financial reports using Python in Excel
- Visualizing NLP results in Excel charts

Day 3

Implementing and Scaling AI in Excel with Python for Financial Modeling

Session 1: AI in Portfolio Management and Investment Analysis
- Portfolio optimization using Python's scipy in Excel
- Creating dynamic dashboards for investment analysis with Python-generated data
- Hands-on session: Developing an AI-powered investment strategy using Python in Excel

Session 2: Fraud Detection and Anomaly Analysis in Excel with Python
- Using Python's isolation forest algorithm for anomaly detection in Excel
- Advanced filtering techniques using pandas in Excel
- Case study: Building a fraud detection system with Python integration in Excel

Session 3: Integrating External Data and AI Models with Excel and Python
- Connecting Excel to external data sources
- Large-scale data modeling in Excel with Python enabled applications
- Best practices for model deployment and maintenance in Excel with Python scripts

Session 4: Ethical Considerations and Data Governance in Excel with Python
- Discussion on ethical consideration and data security for users
- Ensuring data privacy and security in Excel models with Python integration
- Best practices for transparent and fair AI-enhanced Excel models using Python

Programme Schedule

08:30 am – 09:00 am	Registration & Coffee Break
09:00 am – 11:00 am	Course
11:00 am – 11:30 am	Networking & Coffee Break
11:30 am – 01:00 pm	Course
01:00 pm – 02:00 pm	Networking & Luncheon
02:00 pm – 03:00 pm	Course
03:00 pm – 03:15 pm	Networking Break
03:15 pm – 05:00 pm	Course

Who Should Attend?

This program is built for forward-thinking professionals ready to lead the AI shift in finance. Ideal for:
- **C-level Executives & CFOs** – Driving AI-powered finance transformation
- **Financial Analysts & Managers** – Enhancing forecasting & automation
- **Investors & Portfolio Managers** – Applying AI to strategy & dashboards
- **Risk & Compliance Officers** – Using Python in Excel for fraud & anomaly detection
- **BI & Data Analysts** – Bridging finance with AI and data science
- **Excel Power Users** – Embedding Python/AI into daily workflows
- **Finance Students & Graduates** – Gaining future-ready, in-demand skills

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Registration Form

Please fill & sign below form & send us on
training@corsol.net

Delegate 1
Name : _____
Job title: _____
Email: _____
Mobile:_____

Delegate 2
Name : _____
Job title: _____
Email: _____
Mobile:_____

Delegate 3
Name : _____
Job title: _____
Email: _____
Mobile:_____

Delegate 4
Name : _____
Job title: _____
Email: _____
Mobile:_____

Delegate 5
Name : _____
Job title: _____
Email: _____
Mobile:_____

Note: In case of 6 or more nominations make a duplicate of this form & fill in the details.

ORGANIZATION DETAILS:
Company :_____
Address: (to be used on invoice):
_____
_____
Telephone:_____
Country: _____

AUTHORIZED BY:
Signature:_____
Name: _____
JobTitle:_____
Email:_____
Date:_____

PAYMENT DETAILS:
Credit Card Holder's Details - To send Payment Link
First Name: _____
Last Name: _____
Email: _____
Country: _____

Event Code: CSM-AIFM-110

Course Fee

Registration Fees:
- Book 1 delegate — Pay USD 3,295/delegate
- Book 2 or 4 delegates — Pay USD 2,895/delegate
- Book 5 or more — Pay USD 2,795/delegate

(All pricing excludes all taxes)

Payment Mode:
- Payments will be made by **Credit Card** or by **Bank transfer**, an Invoice will be sent soon after we receive the signed & filled registration form.
- Payment is required within **5 working days** after the receipt of the invoice.
- Payment must be received in full prior to the Course Origination.

Terms & Conditions:

1) Fee Includes (For Face 2 Face Training): the course fee covers all course material, lunch & refreshments. Please note that hotel accommodation is not included in the course fee.

2) Fee Includes (For Virtual Training): the course fee covers the live course session & the course material soft copies along with Certificates of Attendance.

3) Payment terms: Payments are required within 5 working days from the date of receipt of an invoice; all payments should be transferred by Credit Card/bank transfer to the Corsol International account. A receipt will be issued as payment is received.

4) Cancellation /Substitution Policy: Cancellation is only acceptable if submitted to us by email & will be subject to charges, cancellation received 60 days prior to the event 25% of the training fee will be charged, 30 Days prior to the event 50% of the training fee will be charged. 15 days prior to the event 75% of the training fee will be charged, 7 days prior to the event 100 % of the training fee will be charged. Substitution is the best option to avoid cancellation, as the cancellation is required in writing via email likewise Substitution is also required by email with complete details of the substituted delegates (Name, Position, Email & Mobile).

5) In the case of No Show, clients cannot claim any refund, & are not entitled to claim the Credit Voucher.

6) Cancellation by a paid client; does not subject to any cancellation charges, Corsol International will either accept the substitution or will provide a Credit Voucher of the Invoice amount which can be utilized in any of our future training, with validity up to 6 months.

7) Every possible effort is made to incorporate the event as it campaigns, however, due to any unforeseen circumstances Corsol International reserves the right to change the venue, location, and trainer. Also due to unforeseen circumstances, the event may be canceled or postponed, in this case, the paid delegate(s) Corsol International will process & refund the full amount, less the bank/service charges up to 5 % or less.

8) While all topics shown in this brochure will be covered in the course, the facilitator/instructor reserves the right to restructure and delivers them in a different order or sequence.

6) The client is considered aware of all the above terms and conditions, as they sign on this registration form & Corsol International will not be responsible for any expectation or monetary loss as indicated above.

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