AZEK gen AI Certificate on Generative Artificial Intelligence

Offer

There is a growing need for industry experts who can bridge the gap between complex AI systems and real-world financial applications. AZEK offers an innovative continuing education programme that provides financial professionals with a foundational understanding of AI concepts and tools to apply them in their daily work.

Target audience

The programme is aimed at financial professionals in the fields of investment advice, financial planning, asset management and private banking, as well as anyone who wants to use gen AI in their daily work.

Aim of the course

The course equips financial professionals with practical knowledge of gen AI, focusing on real-world applications in the financial industry. Participants will explore how tools like large language models (LLMs), including ChatGPT, and other AI technologies can address everyday challenges in areas like analysis, reporting, compliance, and client interaction. Through hands-on use cases from instructors and participants, the course highlights where gen AI creates value in finance today—and how to apply it effectively in practice.

Learning objectives

- Understand the practical capabilities and limits of modern gen AI tools in finance.
- Identify relevant gen AI applications across financial domains.
- Apply gen AI tools to real-world use cases.
- Choose suitable gen AI solutions for specific tasks.
- Integrate gen AI into financial decision-making and workflows.
- Exchange ideas / solutions with peers and experts.

Study content

Module 1: Understanding AI and optimizing its use

- Fundamentals of generative AI
- Identifying tasks to delegate in the financial industry
- Mastering the art of prompting (ACTIF method)
- Data protection with AI
- The 15 situations to master with AI
- Practical workshops on real-life financial scenarios
- Prompt library for finance

Module 2: Identifying and solving business use cases

- The 5 "whys" of an AI business case
- Practical case: researching financial information
- Advanced prompting techniques
- Hands-on financial use cases to solve in workshops
- Development of customized GPTs
- "CODE" methodology for solving business cases with AI

Personal project work

- Identifying your personal AI project
- Developing the resolution of the personal AI project
- AI business case (submission of a written report beforehand using the CODE methodology for solving AI cases.

Modules 3+4: Practical application and gen AI business cases

- Solving financial business cases, application of CODE methodology for solving AI cases
- Presentation of the participants' work projects

Format

In-class teaching of modules 1-4 on two days.

Development and presentation of the individual project work.

Start and duration

The course is organised twice a year, in spring and autumn. The dates of the modules are published on www.azek.ch. Together with the preparation and project work, the learning effort is 20-25 hours.

Certification

After successfully completing all modules and presenting their personal project, participants are awarded the gen AI certificate.

Venues and languages

Zurich (German)

Geneva (French)

Costs

Course   CHF   1'700

Contact

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