

GLOBALLY RECOGNIZED · VENDOR-NEUTRAL · ANSI-ALIGNED

Certified Agentic AI Finance Professional

— (CAAIFP)

Become a Globally Recognized Agentic AI Finance Professional

Earn the CAAIFP credential — gain the skills to deploy autonomous AI agents across the finance function — financial analysis, forecasting, reconciliation, the close, controls, and decision support — and command a **20–60% higher salary**.



4.8/5 Reviews.io (96%) · 4.4/5 Trustpilot · 2,50,000+ certified

Enroll at gsdcouncil.org/certified-agentic-ai-finance-professional

Global Skill Development Council · US · Singapore · Switzerland

Why This Certification, Why Now

Finance teams are moving agentic AI from experimentation into everyday work — across analysis, the close, reconciliation, and reporting — while finance still demands rigorous controls, auditability, and human oversight. This is the skillset that bridges both sides.



Autonomous agents are entering finance

Finance teams already use AI agents to analyze statements, run FP&A workflows, reconcile transactions, and draft board-ready commentary.



The close and reporting are accelerating

Month-end close, reconciliation, and management reporting are moving from days to hours with agentic workflows.



Financial decisions carry the highest stakes

Accuracy, controls, and SOX / IFRS-GAAP compliance demand skills that generic AI training doesn't cover.



Leaders need responsible AI, not just automation

Organizations want finance-AI that is explainable, auditable, and human-overseen — not a black box.

FROM THEORY TO PRACTICE

What You'll Be Able to Do



Understand the fundamentals of agentic AI and its applications across modern finance and accounting



Explain agentic AI architectures, reasoning, memory, and autonomous financial workflows



Apply agentic AI to financial analysis, budgeting, forecasting, and management reporting



Automate finance operations — AP/AR, invoice matching, reconciliation, and month-end close



Leverage agentic AI for investment analysis, portfolio monitoring, and decision support



Ensure compliance, auditability, explainability, and responsible AI across financial environments

Why GSDC

**4.4 / 5**

Trustpilot · Excellent

**4.8 / 5**

Reviews.io · 96% recommend

2,50,000+

professionals certified

500+

Fortune clients

190+

countries served

Since 2016

US · SG · Switzerland



Independent, vendor-neutral certification body established in 2016 — offices in the US, Singapore, and Switzerland.



Accredited by ABICB (Accreditation Board for International Certification Bodies) and a proud member of ANSI.



Alumni work at 500+ Fortune companies across 190+ countries; 100+ Authorized Training Partners worldwide.



Certification built and reviewed with AI practitioners, finance-technology experts, and finance leaders driving responsible AI adoption.

RECOMMENDED BY

Forbes · Indeed · TechTarget · CareerSidekick · LeanIX · People Managing People · Authentic

**ABICB Accredited****ANSI Member****Vendor-Neutral**

See our [Wall of Fame & verified reviews](#) → · trustpilot.com/review/gsdccouncil.org · reviews.io

TRUSTED BY 2,50,000+ PROFESSIONALS



Our Global Clients

Professionals across technology, cloud, banking, and enterprise finance teams hold GSDC certifications.

Oracle

Amazon

Microsoft

Cisco

Veritas

HP

Bank of America

Deloitte

Volkswagen

IS THIS FOR YOU?

Who Is This Certification For?

- Finance professionals, controllers, and FP&A analysts
- Accountants, auditors, and finance-operations specialists
- Finance managers and CFO-office team members exploring AI automation
- Consultants and analysts driving finance transformation
- Investment professionals exploring agentic AI, trading, and wealth-management applications
- Finance professionals exploring AI as a career differentiator
- Anyone pursuing agentic AI for finance to advance their career

PRE-REQUISITES

There are no mandatory prerequisites. Familiarity with core finance and accounting concepts and a basic understanding of AI will be beneficial, but no formal AI background is required — the program builds from the foundations of Agentic AI and applies them directly to real finance, accounting, investment, and risk workflows.

Learn from Experts

Learn from experienced practitioners and industry leaders who design, update, and teach the program — bringing real-world agentic AI and finance-technology expertise to every module.



Maxim Salnikov

MICROSOFT

Digital and App Innovation
Business Lead, Western Europe



Trevor Wiseman

THE CIRCUIT

VP of Technology & AI Governance



Swathi Adimulam

ORACLE

OCI Cloud & AI Architect



Hayk Hakobyan

INSIGHTGENIE

Co-Founder



Baris Dirim

CULTUREASY

Human Systems Architect

What You'll Learn

16+ hours across the full finance-function AI journey, with hands-on demos and real frameworks built into every module. Each module pairs videos and e-books with templates and Learn-By-Doing activities.

1

Foundations of AI, Generative AI, and Agentic AI

Autonomy, goal-orientation, and the shift from content generation to autonomous action

2

Architecture of AI Agents and Multi-Agent Systems

LLM core, memory, planning, tool use, and orchestration frameworks

3

Agentic AI in Financial Analysis and Planning

Statement analysis, FP&A forecasting, variance, and management reporting

4

Intelligent Automation of Finance Operations

AP/AR, invoice matching, reconciliation, and month-end close

5

Agentic AI for Investment and Decision Support

Market research, portfolio monitoring, investment memos, and sentiment analysis

6

Fraud Detection, Controls, and Financial Risk

Anomaly detection, controls testing, and credit-risk assessment

7

Governance, Compliance, and Responsible AI in Finance

SOX, IFRS/GAAP, explainability, and human-in-the-loop controls

8

Capstone Project — Applied Agentic Finance Workflow

Design an end-to-end workflow such as an autonomous month-end close or forecasting pipeline

Module-by-Module

Module 1 — Foundations of AI, Generative AI, and Agentic AI

- Evolution from Traditional AI to Generative AI to Agentic AI
- What makes AI “agentic”: autonomy, goal-orientation, and decision-making
- Generative vs agentic AI: content creation vs autonomous action
- Core concepts: agents, environments, goals, actions, and feedback loops
- Overview of the agentic AI landscape and enterprise use cases

Module 2 — Architecture of AI Agents and Multi-Agent Systems

- Anatomy of an AI agent: LLM core, memory, planning, and tool use
- Reasoning and planning techniques (ReAct, Chain-of-Thought, Reflection)
- Memory systems: short-term, long-term, and Retrieval-Augmented Generation (RAG)
- Tool calling, function calling, and API/data integration
- Multi-agent orchestration, collaboration, and workflow design
- Popular agentic frameworks (LangChain, LangGraph, AutoGen, CrewAI)

Module 3 — Agentic AI in Financial Analysis and Planning

- Autonomous financial-statement analysis and ratio computation
- AI agents for budgeting, forecasting, and variance analysis (FP&A)
- Automated management reporting and narrative commentary generation
- Scenario modeling and what-if simulation with agentic workflows
- Real-time cash-flow and liquidity monitoring agents

Module 4 — Intelligent Automation of Finance Operations

- Agentic automation of accounts payable and accounts receivable
- Autonomous invoice processing, matching, and reconciliation
- Month-end and period-end close acceleration with AI agents
- Expense management and automated audit-trail generation
- Integrating agents with ERP and accounting systems (SAP, Oracle, NetSuite)

Module-by-Module

Module 5 — Agentic AI for Investment and Decision Support

- AI agents for market research and equity analysis
- Portfolio monitoring, rebalancing signals, and alerts
- Automated insight generation and investment memos
- Sentiment analysis of filings, earnings calls, and financial news
- Robo-advisory concepts and personalized financial guidance

Module 6 — Fraud Detection, Controls, and Financial Risk

- Anomaly detection and autonomous transaction monitoring
- Agentic workflows for fraud investigation and case triage
- Continuous controls testing and auditing agents
- Credit-risk assessment and automated underwriting support

Module 7 — Governance, Compliance, and Responsible AI in Finance

- Regulatory considerations (SOX, IFRS/GAAP, model risk management)
- Explainability, auditability, and human-in-the-loop controls
- Data privacy, security, and bias in financial AI
- Building trustworthy and compliant agentic finance systems



Capstone Project · Applied Agentic Finance Workflow

- Design an end-to-end agentic finance workflow (such as an autonomous month-end close or a forecasting pipeline) for a mock enterprise, including human-oversight checkpoints.
- SME-reviewed, portfolio-ready. Plus 1-on-1 and daily expert sessions.

A Guided 4-Week Path to Certification

Self-paced study, daily live sessions, personal mentoring, and hands-on practice — finish in as little as one week.



WEEK 1 · FOUNDATION

Self-paced modules

16+ hrs expert-led video, e-books, templates & toolkits · lifetime access



WEEK 2 · DAILY LIVE

GSDC Studio

Daily live sessions with global experts · 100+ monthly · free recordings



WEEK 3 · PRACTICE

Learn by Doing + 1-on-1 SME

Build an FP&A assistant agent that computes KPIs & drafts board-ready commentary, plus an autonomous reconciliation agent, with personal SME reviews



WEEK 4 · CERTIFICATION

Apply & Get Certified

Practice exams + capstone project, final proctored exam · portfolio-ready deliverables

Move at your own pace. This is a suggested roadmap — driven learners can finish in as little as one week.

ALL IN ONE ENROLLMENT

Everything Included



Expert-Led Videos

16+ hours, self-paced



SME Connect

1-on-1 with industry experts



Capstone Project

Design an end-to-end agentic finance workflow with human-oversight checkpoints



GSDC Studio

100+ live monthly sessions



Learn By Doing

Hands-on demos: FP&A assistant & reconciliation agents



Job Support

Career help + free GSDC membership

Exam & What to Expect

This is a certification, not a course. Study self-paced with the materials provided (plus live support), then sit a proctored online exam. Lifetime access to materials, plus 2 practice exams.

IS THIS FOR YOU?

Who Is This Certification For?

YOUR ROLE	HOW CAAIFP HELPS YOU	CAREER OUTCOME
Financial Analyst / FP&A	Automate statement analysis, forecasting, variance, and management reporting.	→ AI-Augmented FP&A Analyst
Controller / Accountant	Accelerate reconciliation, month-end close, and audit-trail generation.	→ AI-Enabled Controller
Finance Operations Specialist	Automate AP/AR, invoice matching, and expense workflows with agents.	→ Finance Automation Lead
Auditor / Risk Professional	Deploy anomaly detection, controls testing, and fraud-investigation agents.	→ AI Risk & Controls Lead
Investment / Treasury Professional	Support market research, portfolio monitoring, and cash-flow insight.	→ Investment AI Analyst
Finance Leader / CFO Office	Govern compliant, auditable, human-overseen AI adoption across finance.	→ Finance AI Governance Lead

No formal AI background required — built for finance professionals at every level, from analysts to the CFO office, ready to apply agentic AI responsibly.



7-Day Money-Back Guarantee

Enroll with zero risk — full refund within 7 days if you feel you haven't gained the skills you're looking for. Includes a complimentary exam retake and lifetime access to your materials.

 [Chat on WhatsApp](#)

 [Book a 10-min advisor call](#)

Choose Your Plan

Single Access

1

CERTIFICATION

- ✓ Self-paced expert-led videos + GSDC Studio
- ✓ 3 SME Connect (1-on-1) sessions
- ✓ Capstone Project + Job Support + membership
- ✓ Exam + 1 free retake & practice

Bundle Access

MOST POPULAR

3

CERTIFICATIONS

- ✓ Everything in Single, across 3 certifications
- ✓ Unlimited SME Connect (1-on-1)
- ✓ Exam + 2 free retakes & practice
- ✓ Most-chosen by serious learners

Region-specific pricing shown at enrollment · Teams? Ask about GSDC for Business.

Enroll Now → gsdcouncil.org/certified-agentic-ai-finance-professional

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