

## FMI LEARNING SERIES

# Using AI in financial modeling: What you need to know today

### EVENT SYNOPSIS

Claude and Copilot can write formulas, generate analyses, and build financial models.

In this interactive session, Ian Schnoor, Executive Director of Financial Modeling Institute, cuts through the hype to explore where AI genuinely enhances productivity and how to integrate it thoughtfully into your practice.

### STRUCTURE & DURATION

#### What You'll Learn:

- What AI can (and can't) do in financial modeling
- The risks of AI-generated models and how to manage them
- Why the human skills around AI are now your competitive edge

#### Session Overview:

Duration: 60 minutes

- Introduction (5 minutes)
- Presentation by Ian Schnoor (45 minutes)
- Q&A (10 minutes)

### Ian Schnoor, CFA, CFM

Executive Director, Financial Modeling Institute



Ian Schnoor is the Executive Director of Financial Modeling Institute, the world's only financial modeling accreditation organization. He is the creator of the Financial Modeling Practical Skills Module used in the CFA Program.

Ian began his career in investment banking at Citigroup and BMO Capital Markets. He is a CFA Charterholder and the founder of The Marquee Group, a leading financial modeling training and consulting firm that was sold in 2023. He has trained thousands of professionals and is widely recognized for his practical approach to financial modeling.