



Certificate in AI Strategies and Implementation

Certificate Description

Prepare your organization for the future by integrating AI in your operations. This certificate provides an overview of how AI is transforming the accounting and finance profession, focusing on finding and applying your first AI use case. You will learn how to evaluate and prioritize AI opportunities, use AI in real-world scenarios, and understand the business trade-offs involved.

The course also covers strategies for managing AI-driven change and ensuring responsible AI deployment to reduce risks. You will learn how to align AI strategies with business goals and assess real-world use cases to improve productivity. Practical tools and examples in accounting and finance will help you navigate the complexities of AI implementation while balancing business needs and risks.

10 PD Hours



Topics Covered

Identifying AI Opportunities in Accounting & Finance

- Discover practical AI use cases that automate repetitive tasks and improve efficiency
- Learn how to assess potential ROI and business value of AI initiatives
- Identify high-impact opportunities tailored to accounting and finance functions

Managing AI-Driven Change in Your Organization

- Equip teams with the skills needed to adopt and use AI tools effectively
- Address resistance by positioning AI as an enabler of better workflows
- Lead change initiatives and foster a culture of innovation

Evaluating and Prioritizing AI Initiatives

- Develop a structured approach to selecting the right AI projects
- Focus on opportunities that deliver measurable business outcomes
- Build a roadmap to guide successful AI adoption from pilot to scale

Responsible AI and Risk Mitigation

- Ensure ethical and compliant use of AI across your organization
- Understand risks such as data bias, errors, and misinterpretation
- Implement governance practices and documentation for responsible deployment

Implementing AI: Tools, Data, and Infrastructure

- Develop a structured approach to selecting the right AI solutions that integrate with existing systems
- Learn the importance of clean, structured, and accessible data
- Explore strategies for building secure, scalable AI infrastructure



Who will Benefit?

This course is designed for CPAs looking to innovate through AI and improve their organization's efficiency. No prior AI experience required, but a basic understanding of business operations is helpful.

Class Schedule

Class 1 | December 7, 2026

9:00 AM – 12:00 PM EDT

Class 2 | December 9, 2026

9:00 AM – 12:00 PM EDT

Class 3 | December 11, 2026

9:00 AM – 1:00 PM EDT

You must attend at least 2 live sessions to earn your PD hours and Digital Badge.

Key Takeaways

Upon completion of this certificate, participants will:

- Identify high-value AI use cases in accounting and finance to improve efficiency and productivity
- Evaluate and prioritize AI opportunities based on ROI, feasibility, and business impact
- Develop a practical roadmap for implementing AI within their organization
- Apply AI tools in real-world scenarios while understanding associated trade-offs and risks
- Lead and manage AI-driven change initiatives to support adoption across teams
- Implement responsible AI practices that ensure ethical use, compliance, and risk mitigation



Meet Your Instructor

Tomas Milo

Tomas Milo is a CPA and PhD candidate in Management (Accounting specialization) at McGill University, where he combines his accounting expertise with Data Science and empirical research. Previously, Tomas worked at KPMG in their Audit, Deal Advisory, and Data Science departments, where he developed his skills in analyzing financial data and automating accounting processes.

Tomas is the principal consultant at Sigma Optimized, where he leverages AI and analytics tools to refine business processes for CPA firms, medical practices, and venture-funded start ups. Tomas is also a member of the United Nations Framework Classification (UNFC) Taskforce, and he presented his research at the United Nations Resource Management Week 2024 in Geneva.

Have Questions? Speak to an Advisor.

To speak to one of our advisors, please fill out this [form](#).

