



Certificate in Leading AI Integration for Agile CPAs

Certificate Description

Bridging Finance Expertise with AI Transformation – No Coding Required

The escalating AI talent war is well documented, signaling fierce competition for technical experts. However, this trend also exposes a critical gap: while engineers develop AI models, businesses urgently need strategic leaders who can effectively manage, deploy, and commercialize AI solutions in real-world business settings.

CPAs are often responsible for ensuring financial systems comply with regulations. AI systems that automate financial tasks like fraud detection, forecasting and auditing need to be transparent and auditable. As CPAs now serve as strategic advisors, their input is important in guiding tech investments, ROI on AI tools and ethical implications.

AI Product Management is important for CPAs because it gives them the ability to explain AI models, build and test controls and safeguards and engage better with internal and client systems.

12 PD Hours



Topics Covered

AI Fundamentals for Business Leaders

- Understand AI/ML concepts, data requirements and limitations – explained in clear, business-friendly terms with relevant examples from both enterprise and start-up settings.
- Explore applications such as audit automation, fraud detection, forecasting, and risk modelling, with real-world case studies spanning global enterprises and agile start-ups.

Stakeholder Mapping, Change Management & Funding

- Engage executives, technical teams, clients, regulators and investors.
- Understand funding dynamics and investor expectations in both start-up fundraising and enterprise budget cycles to secure buy-in and ensure smooth adoption.

AI Product Lifecycle: From 0-1 to Scale

- Navigate the full product journey – ideation, market validation, MVP design, testing, launch, onboarding, adoption strategies and scaling.
- Learn how product development and deployment differ between lean start-ups and large enterprises.

Go-to-Market (GTM) for AI-Enabled Products

- Develop pricing, value propositions and commercialization strategies tailored to niche start-up markets and large enterprise clients.
- Address onboarding, client training and adoption challenges in each context

This certificate will benefit CPAs and finance professionals who are driving or influencing AI adoption in business settings.

Schedule

Class 1 | October 6, 2026

9:00 AM – 1:00 PM EDT

Class 2 | October 13, 2026

9:00 AM – 1:00 PM EDT

Class 3 | October 20, 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:

- Communicate AI concepts to both technical teams and executive stakeholders.
- Contribute to AI product roadmaps, commercialization plans, and risk reviews.
- Lead GTM, onboarding, and adoption strategies for AI tools in finance, audit, and client services.
- Enhance client engagement through data-driven insights and AI-enabled value offerings.
- Navigate the ethical, compliance, and governance requirements of AI applications.

Meet Your Instructor

Wei Yang, MBA, FRM

Wei Yang, is a seasoned and results-driven leader in business-technology transformation, specializing in consulting, modernization, and change management. With expertise spanning product development, strategic management, and program governance, she has a deep focus on the financial services sector, including capital markets, treasury, and wealth management.

Currently serving as a Director at Scotiabank, Wei plays a key leadership role in shaping the global wealth management product strategy. In her previous positions, she led global capital markets engineering and consulting teams, driving large-scale business platform modernization initiatives.

Wei holds an MBA from the Rotman School of Management, specializing in Consulting, Strategy, and Change Management. She also holds a bachelor's degree in finance from the University of Toronto and is a certified Financial Risk Manager (FRM).



Have Questions? Speak to an Advisor.

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

