Digital Skills

Generative AI for Fund Administrators – Boost your Efficiency, Enhance Compliance & Stay Irreplaceable

Course Details

Price

£255.00

Length

Half day (09:30-13:00)

Course Overview

A specialist hands-on course designed for fund administration professionals to master the use of AI for investor services, compliance, secretarial duties, reporting, research, document analysis, and workflow optimisation — without coding.

Stay ahead of AI-driven changes reshaping fund administration and gain a competitive edge, positioning yourself as indispensable in your role. Future proof your career by mastering the AI tools your industry is adopting.

Course Content

AI Fundamentals for Fund Administrators

- What is a Large Language Model and why it matters for fund admin

- Risks, limitations, opportunities in a regulated industry

- Regulatory landscape and emerging trends

Navigating your AI Chatbot & Prompt Engineering for Fund Admin Tasks

- How to craft effective prompts for finance and regulatory tasks

- Hands-on exercises

Practical AI Applications for Fund Admin

- AI for investor and client queries

- AI for research and industry trend analysis

- AI for compliance monitoring and reporting

- AI for preparing presentations and reports

- Summarising market news and fund updates

Secure & Compliant AI Usage

- Confidential data handling

- AI tool risks and how to mitigate them

AI Tools Every Fund Admin Should Know

- Fund-specific AI tools and platforms

- Case Studies

- CoSec Functions

- Regulatory Research and Compliance

- New Fund Research

Benefits

By attending this course, delegates will gain:

- Tailored AI applications for fund administration and financial services

- Real-life, job-specific AI use cases you can apply immediately

- Access to a niche prompt library designed for fund professionals

- Practical exercises and live demos using finance-related data sets

- Practical skills to boost efficiency, accuracy, and regulatory compliance

Next Steps

If you would like to book a place on this course, please click on the **'Book Course'** button to the right of this page and login or register for a user account to complete your booking(s). Any queries please do not hesitate to contact us via **admin@gta.gg** or call us on 01481 224570. If no date is scheduled for this course at the present time please click on the **'Register Interest'** button and login or register for a user account so that we can add you to our course interest register. This register allows us to contact our tutors and finalise dates for a course as soon as we have a few people who have expressed their interest, so the more delegates who register their interest, the sooner we can schedule a particular course

Course Tutor

Peter Nyarkoh

Peter Nyarkoh, CG Affiliate brings nearly 17 years of cross-sector experience spanning financial services, consulting, and education. An AI & Career Strategist, public speaker, and an experienced trainer, Peter has taught more than 350 professionals in financial mathematics and over 400 undergraduate students in subjects including Statistics, Business Mathematics, and Time Series Analysis & Forecasting. As a recognised thought leader in AI for finance and fund administration, Peter regularly shares insights through articles, training sessions and a growing online community of finance professionals, having previously spent 6 years at a Big 4 accounting firm. Holding both a Master of Philosophy (MPhil) and a Bachelor of Science (BSc) in Mathematics, he is an Affiliated Member of the Corporate Governance Institute (UK & Ireland), and has completed the required examinations and met the professional experience criteria.

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