LEADINGAGE MASSACHUSETTS · FINANCE TRACK · SYLLABUS

Practical AI for Senior Living Providers — Finance Track

Four live sessions that move from the essential guardrails, to using Claude's built-in finance skills, to building your own skill — and finally to solving a real challenge you bring to the course.

Recommended CPE: 4.0 credits total — 1.0 for each of the four 60-minute sessions — one field of study per session: Information Technology, Accounting, Finance, and Information Technology; delivered group internet based at the Basic level (Sessions 1 and 4) and the Intermediate level (Sessions 2 and 3). Every session is demonstrated live in Claude; a paid Claude plan (Pro, Max, Team or Enterprise) is recommended if you want to run the prompts yourself, and users of other AI tools are welcome, as much of the method carries over.

Session 1 · Guardrails, Best Practices & the Claude Toolkit

Date	Wednesday, January 20, 2027 · 11:00 am ET
Field of study (CPE)	Information Technology
Program level	Basic
CPE credit	1.0
Prerequisites	None
Advance preparation	None

The foundation session, framed as a management control. Before any finance work, participants set the data-governance rules for AI use in their community — what may and may not be entered, and when data must first be de-identified — and see how a stop-and-confirm standing instruction enforces the control. The session covers what a senior living AI use policy has to address and where AI agents fit in back-office work, and closes with a tour of Claude's toolkit (Cowork, Claude Design, Claude Code, Claude in Chrome and Claude for Microsoft 365) and which tool supports which task.

Learning objectives — on completion, participants can:

- Establish data-governance controls for AI use — determine what resident, employee, and financial information may and may not enter an AI tool
- Distinguish de-identification from pseudonymization and identify when data must be de-identified before it enters an AI tool
- Build and save a standing instruction that enforces a stop-and-confirm control when sensitive data appears

- Identify what a senior living AI use policy must cover, and which Claude tool fits which task

Live-build artifact: A stop-and-confirm standing instruction (the enforced control), shown live in Claude.

Deliverables:

- Standing instructions — the stop-and-confirm template on slide 17 of the deck and in Appendix B of the AI Use Policy
- AI Guardrails & Best Practices — the data-governance reference
- An Artificial Intelligence Use Policy template written for senior living providers
- A Claude toolkit overview (Cowork · Claude Design · Claude Code · Claude in Chrome · Claude for Microsoft 365) and where agentic workflows fit

Session 2 · Putting Claude's Finance Skills to Work

Date	Wednesday, January 27, 2027 · 11:00 am ET
Field of study (CPE)	Accounting
Program level	Intermediate
CPE credit	1.0
Prerequisites	Familiarity with financial statements
Advance preparation	None

A guided tour of Claude's built-in finance skills, run in the order a close actually runs. Working from a de-identified trial balance, budget and general-ledger detail — together with the month's bank statement, check register and prior-month reconciliation — Claude, run live, finishes an operating-account reconciliation that does not tie, prepares the month-end accrual, posts both to reach an adjusted trial balance, and only then builds the board statement of operations with variance commentary. Participants watch, then take the prompts home. The sequence is the lesson: reconcile, adjust, report.

Learning objectives — on completion, participants can:

- Use Claude's finance skills — reconciliation, journal-entry, financial-statements, and variance-analysis
- Run each skill on a de-identified sample and review the output
- Judge where a skill's output must be verified before it is relied upon

Live-build artifact: A completed bank reconciliation with the outstanding-check schedule behind it, a balanced month-end accrual, an adjusted trial balance, and a board P&L with variance commentary — produced with the four skills.

Deliverables:

- A "which skill, when" cheat sheet — inputs, outputs, and use cases for each skill
- An outstanding-check schedule derived from a check register and a bank statement, with a rollforward and an aging
- The four sample outputs: reconciliation, journal entry, statements, and variance analysis

- The adjusted trial balance that links them

Session 3 · Building Your Own Finance Skill — Ratio Analysis

Date	Wednesday, February 3, 2027 · 11:00 am ET
Field of study (CPE)	Finance
Program level	Intermediate
CPE credit	1.0
Prerequisites	Familiarity with financial ratios
Advance preparation	None

Participants build their own Claude skill — a ratio-analysis skill that computes an organization's key financial ratios and compares them to the CARF / Ziegler / Baker Tilly 2025 benchmarks, then outputs a branded report, a one-page dashboard and an auditable workbook. It is the leap from using AI to building a repeatable tool with it.

Learning objectives — on completion, participants can:

- Build a reusable Claude skill for finance from scratch
- Encode a ratio-analysis method using the CARF / Ziegler / Baker Tilly 2025 *Financial Ratios & Trend Analysis* benchmarks
- Generate a branded report, a one-page dashboard and an auditable workbook comparing an organization's ratios to the benchmarks

Live-build artifact: A packaged ratio-analysis Claude skill, plus a branded report, a one-page ratio dashboard and an auditable workbook for a fictional community.

Deliverables:

- A reusable ratio-analysis skill
- A full branded report and a one-page dashboard showing the organization's historical ratios and comparisons to the CARF benchmarks (days cash on hand, debt-service coverage, operating margin, days in A/R, cushion ratio, average age of plant)
- An auditable workbook carrying the formulas behind both

Session 4 · Using AI to Solve Real-World Problems

Date	Wednesday, February 10, 2027 · 11:00 am ET
Field of study (CPE)	Information Technology
Program level	Basic
CPE credit	1.0
Prerequisites	None (Sessions 1–3 recommended)
Advance preparation	Completion of the three questions on the Session 1 registration form, including one submitted challenge (about 10 minutes), answered by Tuesday, December 22, 2026; participants who register after December 22, 2026, answer within two days of registering

The capstone. When registering for Session 1, participants describe a solution they want to build or a challenge they want to overcome with AI. The instructor selects representative items and builds real solutions live with Claude — turning a stated problem into a working artifact — and draws out the repeatable method (frame, build, verify) participants can reuse on their own challenges.

Learning objectives — on completion, participants can:

- Turn a real challenge participants submitted before the course into a clear, AI-solvable problem statement
- Build a working solution live with Claude — from framing the problem to a usable artifact
- Apply the human-review, data-governance, and validation steps a solution needs before it is used

Live-build artifact: A working solution to a selected participant-submitted challenge, built live.

Deliverables:

- One or more built solutions to selected participant challenges
- A reusable “problem-to-solution” method — frame, build, verify
- The data-governance and verification checkpoints applied to each solution

How each session runs

Each session runs 60 minutes (1 hour) over Microsoft Teams, presented in real time by Jaime Conley, CPA. Participants join muted and ask questions in the chat, answered throughout. Four brief, unpredictably timed polls run through each session and a participant answers at least three of them (any answer counts), which satisfies the CPE attendance-monitoring requirement. A post-session evaluation and a Certificate of Completion follow. Each session is designed for 50 minutes of instruction (1.0 CPE credit each), plus about five minutes of introduction and a brief close.

How the credit is counted

CPE runs on the 50-minute credit hour. Every session runs 60 minutes and carries 1.0 — so 4.0 for the Finance Track, 4.0 for the Operations Track, 8.0 across both. Credit is earned by attending each session live for the full 60 minutes (per the Teams attendance report) and answering at least three of its four polls; there is no partial credit, and a recording is not offered for credit. The hours are reported to LeadingAge Massachusetts, which issues the Certificates of Completion.

Refunds, cancellations & complaints

Refunds are processed by LeadingAge Massachusetts. Cancel in writing at least 5 business days before a session for a full refund; later cancellations may transfer to another session or a colleague at no charge. No refunds for no-shows. If a session is cancelled or rescheduled, you may transfer or receive a full refund. Refunds are issued within 30 days.

Concerns or complaints? Contact Jaime Conley, CPA, at jconley@odiorneadvisory.com. We acknowledge within 2 business days and respond with a resolution within 15 business days.

CPE is offered as a **non-registered** qualifying program documented to the AICPA/NASBA Standards. **LeadingAge Massachusetts is the sponsor of record**: it issues the Certificates of Completion and retains the program records. Acceptance rests with each attendee's state board, and no ethics credit is offered. Not legal or regulatory advice.

56A Beacon St · Concord, NH 03301 · 828.713.2385 · jconley@odiorneadvisory.com · odiorneadvisory.com