

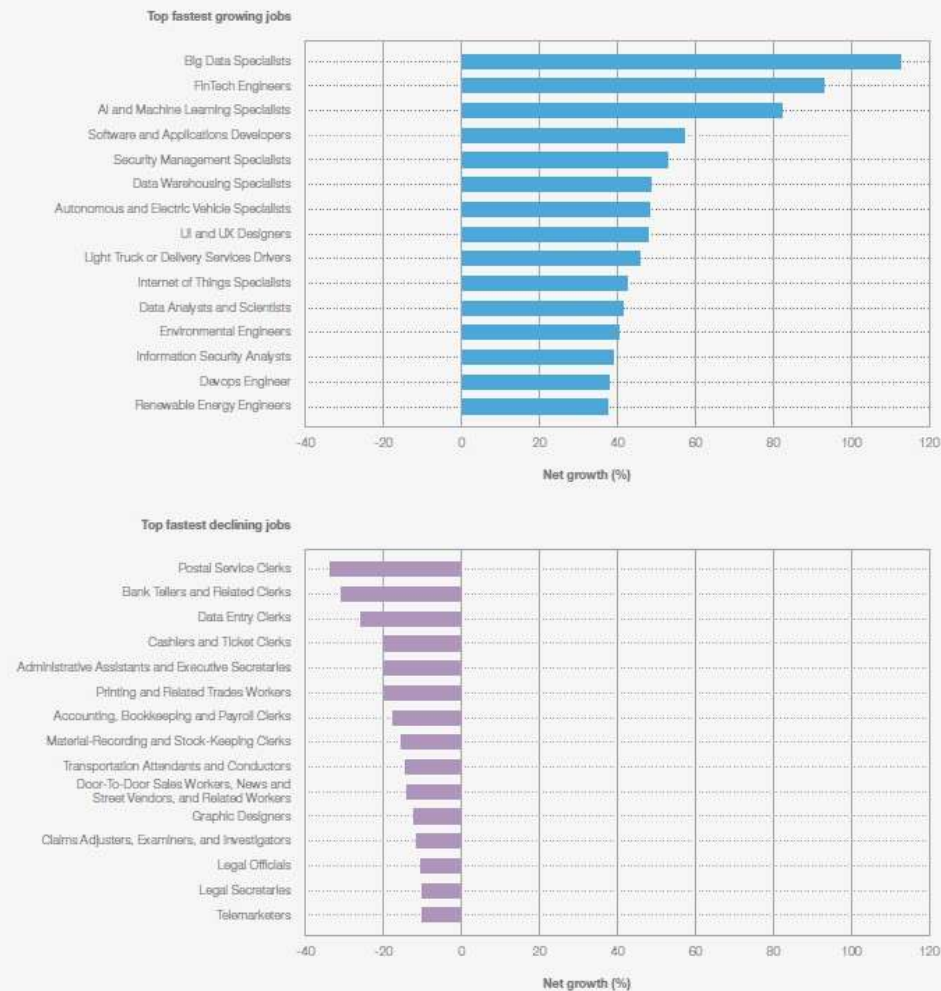
The Next Wave of AI:

- New Tools
 - New Skills
 - New Opportunities

Presented by -
CA Shyam Agarwal



FIGURE 2.2 Fastest-growing and fastest-declining jobs, 2025-2030
Top jobs by fastest net growth and net decline, projected by surveyed employers



Source:
World Economic Forum, Future of Jobs Survey 2024.

Why AI Matters for CAs Today

Rising Compliance Pressure Pressure

Navigating an increasingly complex regulatory landscape with greater efficiency.

Massive Repetitive Workloads

Automating mundane tasks frees up valuable time for strategic work.

Staff Shortages

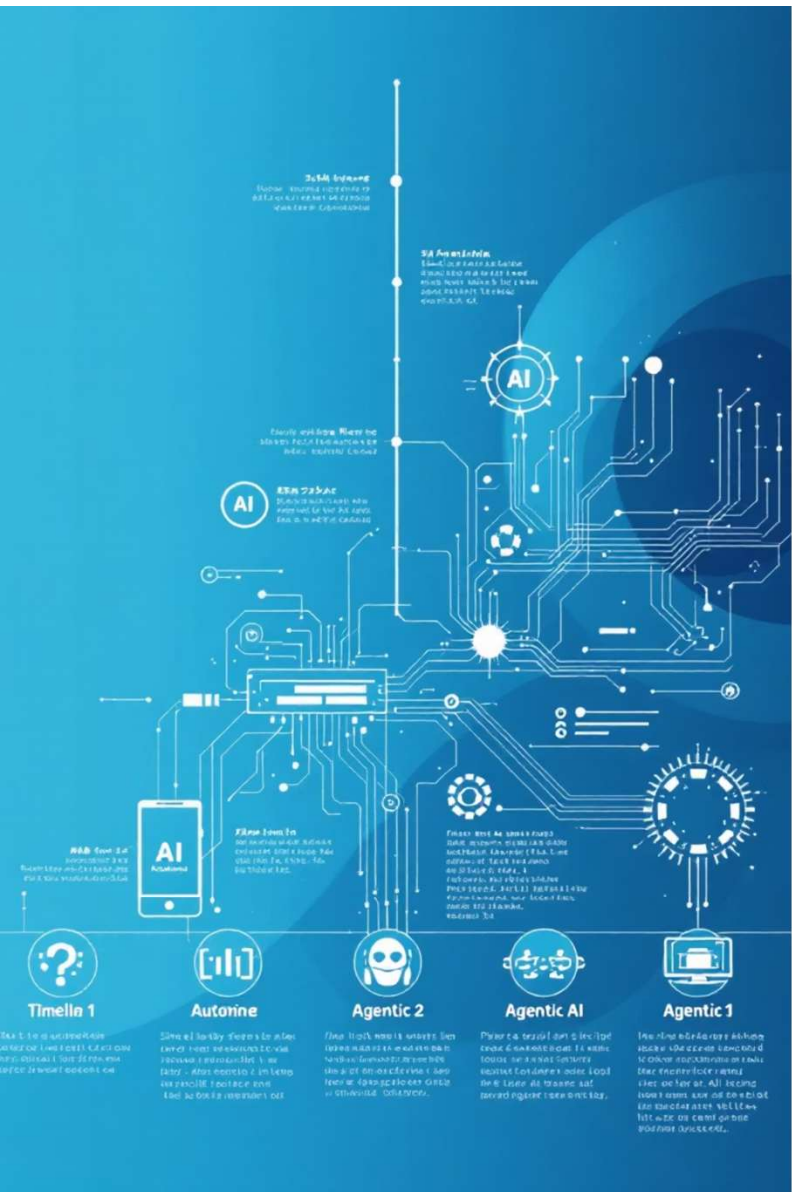
Leveraging AI to augment human capabilities and bridge talent gaps.

Increased Client Expectations Expectations

Delivering faster, more accurate, and insightful services to modern clients.





Digitalisation by Government Bodies

Adapting to and utilizing digital platforms from GSTN, MCA, and Income Tax.



Evolution of AI

The landscape of Artificial Intelligence is rapidly advancing, moving beyond simple automation to intelligent agents that can understand and act.

-  **Traditional Automation**
Rule-based systems for predictable tasks.
-  **Generative AI**
Creating new content, insights, and solutions.
-  **Multi-Modal AI**
Processing various data types: text, images, and audio.
-  **Agentic AI**
AI that can read, analyze, and independently act on complex information.

This evolution significantly impacts CA practice areas, enabling deeper analysis and more proactive roles.

Transformation in CA Workflows

AI is revolutionizing key areas of Chartered Accountancy, streamlining processes and enhancing accuracy.



Audit Sampling & Vouching

Automated identification of anomalies and efficient verification.



GST / IT Reconciliations

Faster and more accurate matching of complex data sets.



Ledger Cleanup

Intelligent identification and correction of errors in ledgers.



Draft Replies & Notices

AI-powered drafting for quicker response times and consistency.



MIS Automation

Automated generation of Management Information Systems reports.



Trial Balance Analysis

Deep insights from financial data, highlighting trends and risks.

ICAI & AI: Shaping the Future of Accountancy

The Institute of Chartered Accountants of India (ICAI) is actively embracing AI to empower its members and prepare for the future.



- **ICAI GPT:** A dedicated AI tool developed by ICAI for members.
- **AQR Digital Tools:** Advanced Quality Review tools leveraging technology for enhanced audit quality.
- **Board of Studies AI Initiatives:** Integrating AI into curriculum and training for CA students.
- **Vision for CA of the Future:** Preparing CAs to be technologically proficient and adaptive to emerging trends.

New AI Tools for CAs: A Comprehensive Overview

A new generation of AI tools is emerging, tailored to the specific needs of Chartered Accountants.

Audit Tools India-focused solutions for anomaly detection and risk scoring.	Taxation Tools AI for legal research, case law analysis, and drafting tax replies.	Accounting & MIS Tools Automating journal entries, variance checks, and report generation.
Practice Management Tools Streamlining administrative tasks and enhancing client communication.		Research & Drafting Tools AI assistance for legal research, document drafting, and content generation.

Audit & Assurance Tools (India-Focused)

Leverage AI to enhance the efficiency and accuracy of your audit processes.

1

AudITech.ai

Specialized in anomaly detection and intelligent risk scoring for Indian audit standards.

2

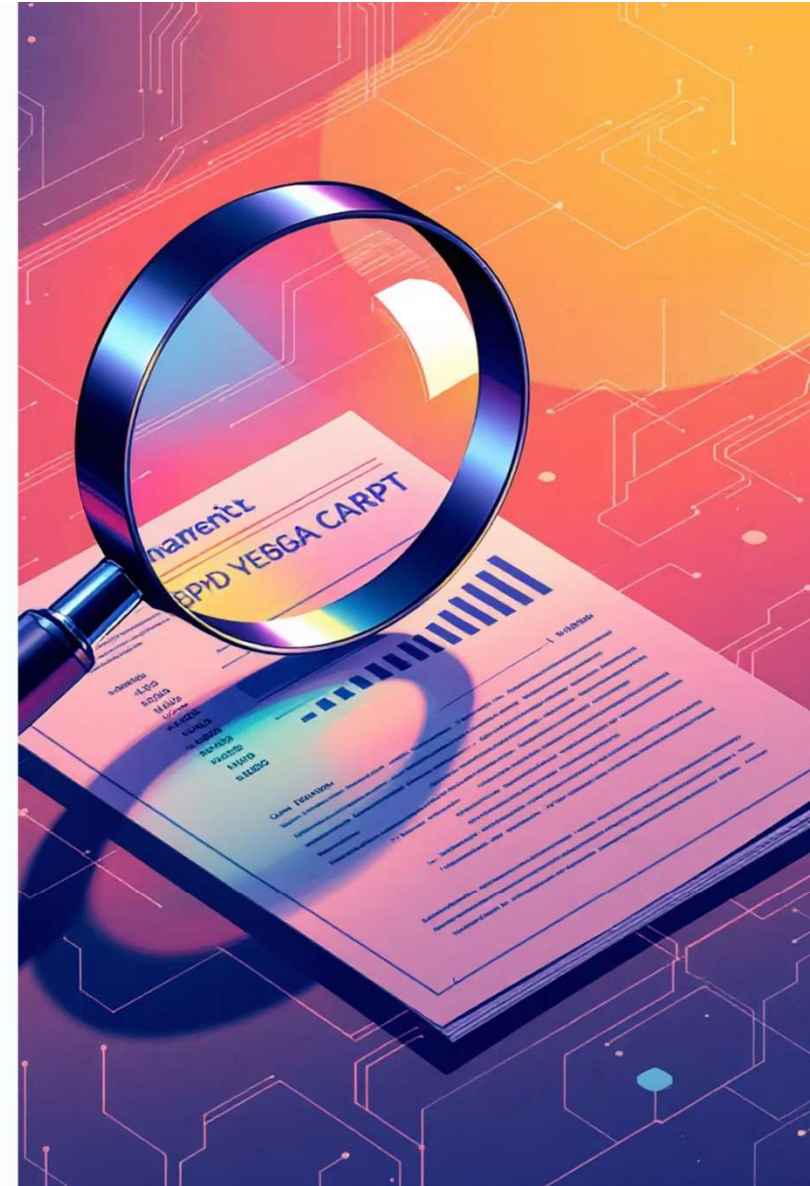
Anyaudit

Comprehensive audit automation platform designed for local regulatory requirements.

3

ChatGPT (File Tools)

Assists with sampling logic, rigorous PDF checking, and generating lead schedules.



Taxation AI Tools (India Specific)

These tools are specifically designed to navigate the complexities of Indian tax laws and regulations.

1

Perplexity Pro

Advanced legal research and summarization of complex case laws.

2

LexLegis AI

Specializes in Income Tax and GST case laws, judgments, and summarized insights.

3

Vidur Tax AI

Facilitates drafting replies, supports arguments, and extracts relevant case law precedents.

4

ChatGPT (File Tools)

Analyzes 2A/2B, ITR JSON, AIS, and other critical IT/GST PDFs for insights.

Accounting & MIS Tools

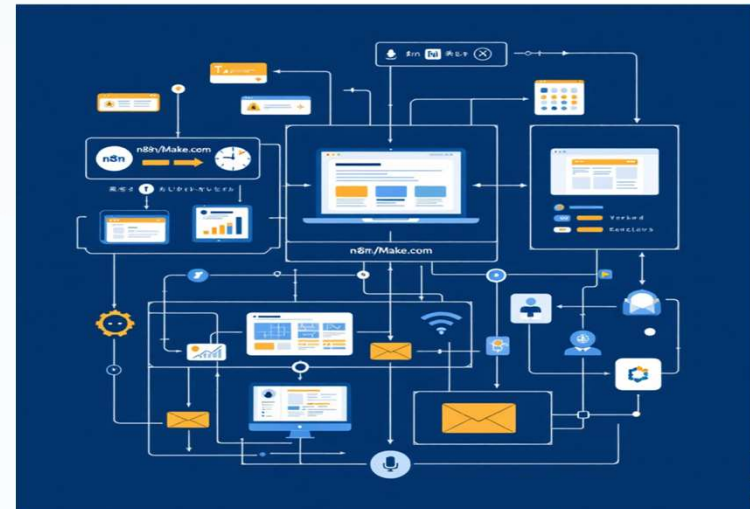
Automate routine accounting tasks and gain deeper insights from your financial data with these powerful tools.

TallyPrime + APIs

- Automated posting of transactions.
- Real-time variance checks for financial discrepancies.
- Integration capabilities for seamless data flow.

n8n / Make.com

- End-to-end MIS automation for regular reporting.
- Automated debtor reminders to improve cash flow.
- Customizable workflows for various accounting processes.



Made with GAMMA

Practice Management Tools

Enhance your practice's efficiency, organization, and client engagement with these modern AI-powered solutions.



Zoho Books + Zoho Flow

Integrated accounting with workflow automation for streamlined operations.



Notion AI

AI-powered workspace for document management, project tracking, and intelligent note-taking.



Microsoft Copilot

AI assistant for productivity across Microsoft 365 applications, enhancing communication and data analysis.

Emerging Opportunities for Indian CAs



AI-Enabled MIS Solutions

Automate monthly MIS for SMEs using tools like Tally and n8n, streamlining reporting.



AI-Based Internal Audit

Leverage AI for ledger analysis with platforms like AudlTech and Kapittx for enhanced accuracy.



Workflow Automation Consulting

Provide expertise in automating processes, such as vendor payment approvals, boosting efficiency.



GST Automation Services

Offer services for PR vs 2A/2B reconciliation using AI, like ChatGPT, to ensure compliance.



Digital CFO Services

Deliver automated forecasting and budget creation, enabling strategic financial planning.



AI Forensic Audits

Utilize AI to detect financial anomalies, such as duplicate or round-tripping entries, ensuring integrity.



Loan & CMA Automation

Automate Credit Monitoring Arrangement (CMA) report generation and ratio analysis with AI.

Corporate Job Roles of the Future

1

Digital Finance Manager

Drive FP&A automation in multinational corporations, optimizing financial operations.

2

AI-Enabled Internal Auditor

Conduct data-driven auditing at banks and NBFCs, enhancing risk management.

3

FP&A + Predictive Analyst

Develop revenue forecasting models using advanced AI to guide strategic decisions.

4

AI Compliance Manager

Oversee automated monitoring of GST/TDS, ensuring regulatory adherence and reducing manual effort.

5

Automation Architect – CFO Office

Implement and manage automation platforms like n8n and Power Automate within finance departments.

6

Risk & Forensic Data Analyst

Specialize in fraud analytics for PSUs and NBFCs, safeguarding financial assets.



AI in India's Regulatory Ecosystem

GST 4.0 Intelligent Matching

Advanced AI algorithms for seamless and accurate matching of GST returns, minimizing discrepancies.

MCA V3 Automation & Validations

Automated processing and validation of corporate filings, enhancing efficiency and data integrity.

IT Portal: AI-Assisted Scrutiny

Income Tax portal leveraging AI to assist in scrutiny processes, ensuring fairness and speed.

SEBI / RBI RegTech Adoption

Regulatory technology adoption by SEBI and RBI to enhance supervision and compliance in financial markets.

Agentic AI for CA Firms: Empowering Efficiency

Agentic AI is poised to revolutionize CA firms by performing complex, repetitive tasks autonomously.



Reads Ledgers/PDFs/Statements

Automated data extraction from various financial documents.



Performs Analysis

Conducts in-depth financial analysis with speed and precision.



Drafts Replies & Emails

Generates professional communication based on analytical findings.



Creates Workpapers

Auto-generates audit workpapers, ensuring compliance and accuracy.



Generates MIS

Produces Management Information Systems reports for informed decision-making.



Sends Reminders

Automates timely reminders for critical deadlines and tasks.

Practical Agent Use Cases for CA Firms

01

Automated Debtors Follow-up

Systematic and timely communication with debtors to streamline collections.

02

End-to-End Client Filing Workflow

Automating the entire process from document collection to final submission for clients.

03

Audit Documentation Generator

Instant creation of comprehensive audit documentation, reducing manual effort.

04

Forensic Red Flag Detection

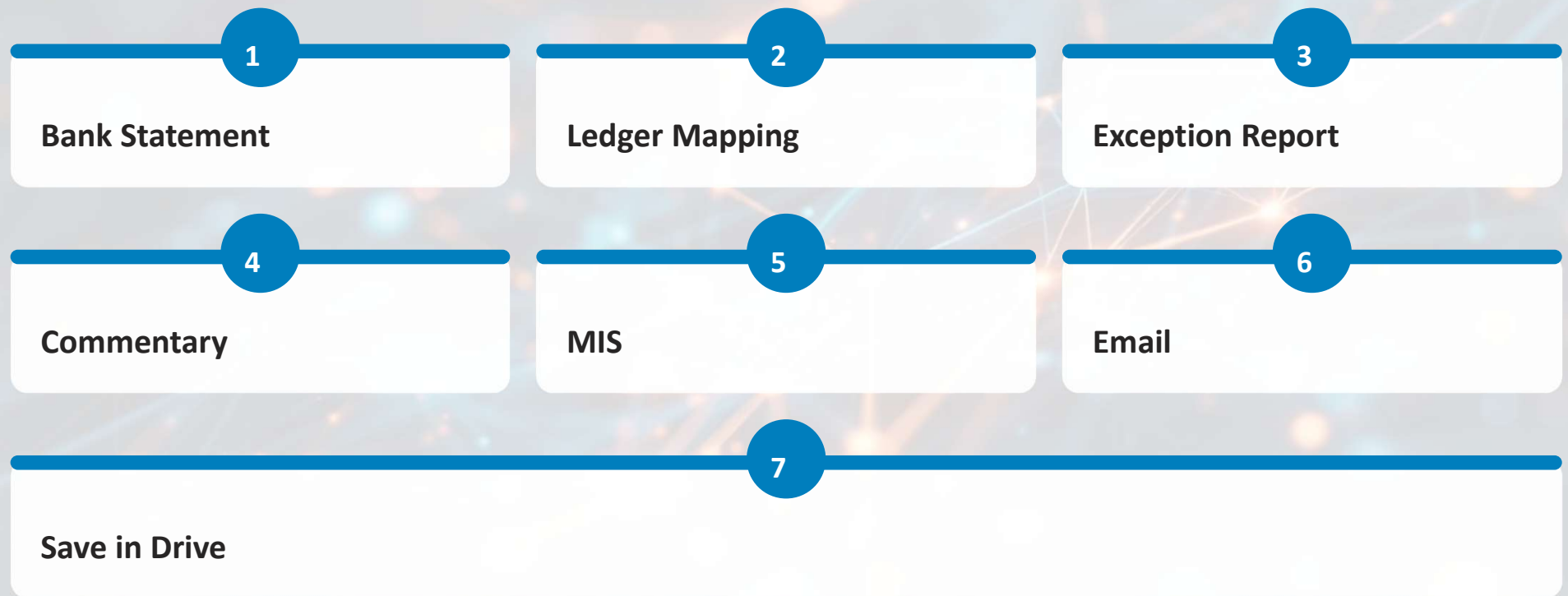
AI-powered identification of suspicious transactions or patterns in financial data.

05

Monthly Management Pack Creation

Automated assembly of monthly management reports for strategic insights.

End-to-End Agent Workflow Example



This fully automated workflow ensures seamless data processing, analysis, reporting, and communication, all managed by intelligent agents, reducing human intervention and increasing accuracy.



The CA of 2025: A New Paradigm



Tech-Enabled

Proficient in leveraging cutting-edge technology for enhanced efficiency.



Advisory-Oriented

Shifting focus from transactional tasks to strategic client advisory.



Data-Driven

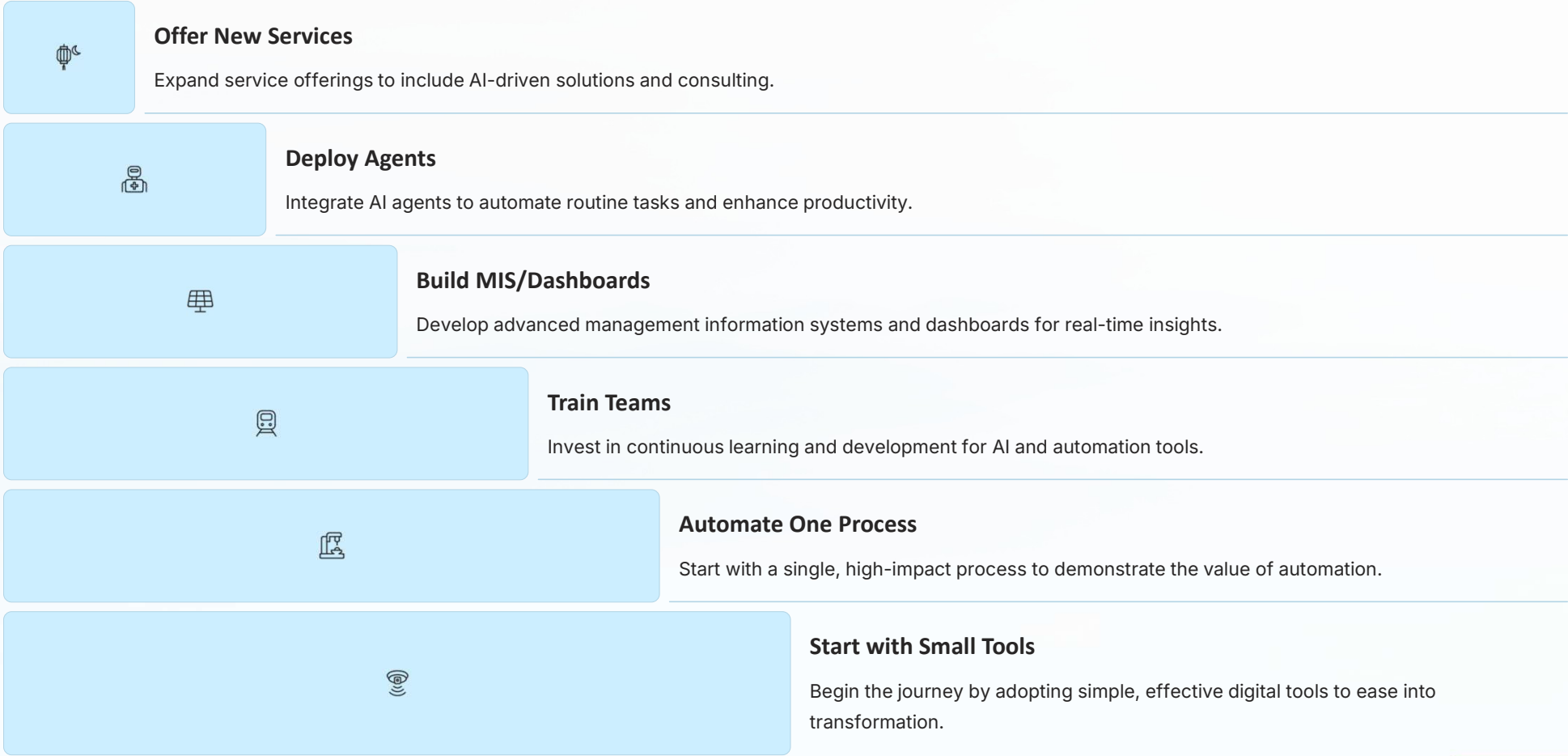
Making informed decisions based on comprehensive data analysis and insights.



AI-Supervised, Not Manual

Working alongside AI, with manual tasks significantly reduced or automated.

Transformation Roadmap for CAs



Toolkit & Key Takeaways

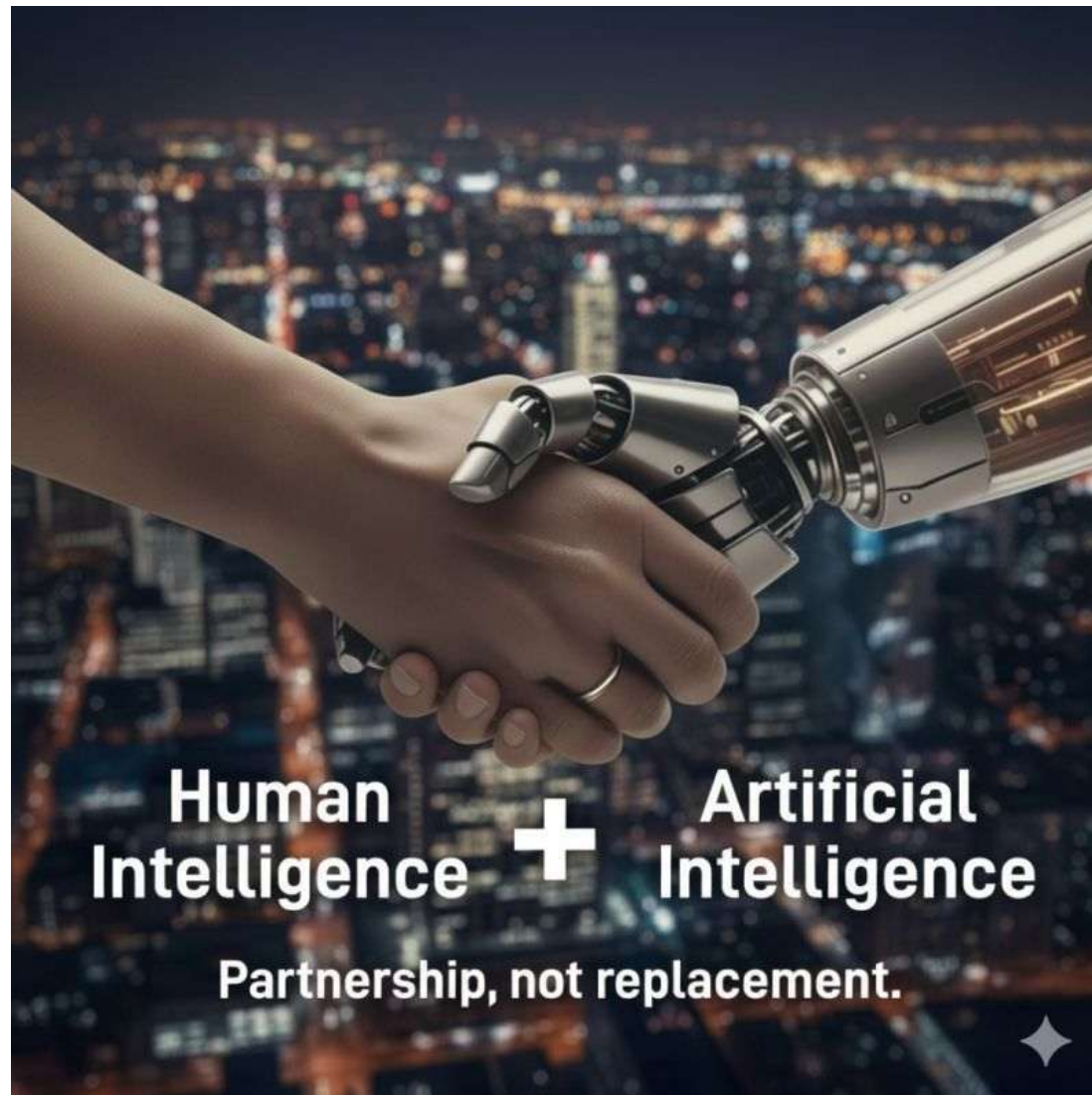
Equip yourself with these cutting-edge tools to maximize efficiency and insight :

1. ChatGpt/ Gemini / Copilot / Claude / Lmarena
2. CAGpt/ Vidur/ Lexlegis
3. Quillbot
4. Chatedu.io
5. Gamma
6. Google AI Studio / Google Notebook LM
7. tinywow
8. Typingtest
9. Turboscribe
10. Thereisanaiforthat.com

Invest in these platforms to future-proof your finance career



Scan this QR code to get
• **2 free ebooks on AI Tools**



**Human
Intelligence + Artificial
Intelligence**

Partnership, not replacement.



YOUR HOMEWORK (NO, REALLY!)



Download AI Apps

Download ChatGPT/Claude TODAY to get started.



Apply AI to a Task

Use it for ONE task this week to see its potential.



Watch an AI Video

Watch ONE AI in Accounting video to deepen your understanding.



Explore Resources

Visit various websites for valuable resources.



Connect with Peers

Connect with one CA who already uses AI.



Share Your Learning

Share your AI journey on LinkedIn.
Post your progress with #AIEabledCA ,
Tag me, tag this conference, tag your journey



Scan to Register

Think Ahead
With AI See, Think & Do, You'll Get There!

Smart Online Course
Your Smart Knowledge Partner



6 HOURS TO AI MASTERY! 

LEARN GENERATIVE AI 

IN 6 HOURS 

Ignite your creative genius and discover the magic of Artificial Intelligence.

Spark creativity, code the future, and redefine what's possible!



Thank You, Future Leaders

Let's Build the
Future Together






Thank You & Q&A

We appreciate your participation. Let's discuss how AI and automation can revolutionize your financial operations.

Let's Connect!

Join me on social media for updates and insights



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