



KAMLESH BANSAL

CA, CFA, CMA, CS

Enterprise Finance & Capital Strategy Leader | AI in Finance | Board & Advisory

“ Bringing real-world CFO perspective and AI-led finance transformation into the classroom. ”

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PROFILE SNAPSHOT

Accomplished finance leader with 25+ years of experience across global banks including Citi, Deutsche Bank, JPMorgan, and ING Vysya Bank. Deep expertise in FP&A, capital allocation, balance sheet strategy, and finance transformation.

Currently pursuing a Doctorate in AI (Finance Applications) with a focus on AI-enabled capital allocation and decision-making in regulated financial systems.

Brings a rare combination of boardroom-level finance experience, hands-on transformation and analytics leadership, and practical AI implementation exposure in banking.



25+
Years of
Experience



4+
Global
Markets



Leadership
Roles Across
Top Institutions



AI in Finance
Implementation
Experience

TEACHING & ENGAGEMENT AREAS



CORE FINANCE

Financial Planning & Analysis (FP&A) • Corporate Finance & Capital Allocation
Banking & Financial Institutions • Balance Sheet Optimization
Performance Management & Value Creation (ROTCE focus)



RISK & REGULATION

Basel Frameworks & Capital Management • Risk Analytics (Credit, Market, Liquidity)
Stress Testing & Scenario Planning



TRANSFORMATION & STRATEGY

Finance Transformation & Operating Model Design
Data-driven Decision Making in Finance • CFO as Strategic Partner



AI IN FINANCE (SPECIAL FOCUS)

AI applications in FP&A, Risk, and Treasury
Predictive Analytics • Automation of decision intelligence • AI-led transformation of
finance functions • Governance, risk, and accountability in AI adoption

WORKSHOP OFFERINGS



A. 2-HOUR EXECUTIVE WORKSHOP

AI in Finance: From Hype to Real Impact

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|----------|---|-------------------|
| 1 | Setting the Context
Evolution of finance Why AI matters now From hindsight to foresight | 15 mins |
| 2 | Where AI is Actually Being Used
FP&A, Risk, Treasury, Pricing What's working vs. what's hype | 25 mins |
| 3 | AI in FP&A – The New Decision Engine
From variance analysis to predictive insights
Framework: Data → Model → Insight → Decision → Value | 25 mins |
| 4 | The Big Risk: "Illusion of Precision"
Why AI can mislead Overfitting vs. real-world uncertainty
Who owns the decision when AI gets it wrong? | 20 mins |
| 5 | Implementation Playbook
Where to start Build vs. buy vs. partner Governance & controls
Checklist: Data readiness, Use-case prioritization, Stakeholder alignment | 20 mins |
| 6 | Interactive Case / Discussion
"Should a bank use AI for capital allocation?" Group discussion | 10-15 mins |
| 7 | Closing Insight
"AI will not replace finance professionals.
But finance professionals who use AI will replace those who don't." | 5 mins |



OUTCOME: Participants gain clarity on real AI use cases, practical frameworks, and leadership implications for finance.



B. 1-DAY DEEP-DIVE WORKSHOP

AI-Driven Finance Transformation: Strategy, Execution, and Leadership

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|----------|---|-------------------|
| 1 | Finance in the Age of AI
Evolution of finance Future role of CFO From reporting to decision science | 60 mins |
| 2 | AI Use Cases Across Finance
FP&A, Risk, Fraud, Treasury, Customer Profitability Real-world case illustrations | 90 mins |
| 3 | AI for Capital Allocation & Balance Sheet Optimization
Capital allocation frameworks RWA optimization Pricing decisions
Linking AI with ROTCE | 75 mins |
| 4 | From Data to Decision
Data → Analytics → Insight → Decision → Action → Value
Why analytics fail at decision stage Storytelling in finance | 60 mins |
| 5 | AI Risks, Governance & Regulation
Model risk Bias & explainability Regulatory expectations (Basel context)
Accountability for AI decisions Governance structures | 60 mins |
| 6 | Implementation Playbook
Use-case identification Data readiness Build vs partner Talent model
Change management Roadmap template | 60 mins |
| 7 | Interactive Case Study
Work on a real-world banking case Apply frameworks Present & discuss | 45-60 mins |
| 8 | Leadership & Career Implications
Future skills for finance professionals CFO as value creator Emerging roles | 30 mins |



OUTCOME: Participants leave with actionable frameworks, implementation roadmap, and strategic perspective.



TEACHING STYLE

- ✓ Case-driven and highly interactive
- ✓ Real-world examples from global banking
- ✓ Focus on decision-making, not just theory
- ✓ Boardroom perspective blended with academic rigor



ENGAGEMENT FORMATS

- ✓ Guest Lectures
- ✓ Adjunct / Visiting Faculty
- ✓ Executive Education Programs
- ✓ Corporate Workshops
- ✓ Leadership Sessions / Speaker Engagements



WHO THIS IS RELEVANT FOR

- ✓ MBA / PGDM students (Finance, Strategy, FinTech)
- ✓ Executive Education participants
- ✓ Mid to senior finance professionals
- ✓ Leadership development programs

SELECT CAREER HIGHLIGHTS

- ★ Director / SVP – FP&A & Finance, Citi (Global roles)
- ★ Leadership roles across Treasury, Capital Strategy, and Performance Management
- ★ Experience across India, New York, London, and the Middle East
- ★ Led finance transformation, analytics, and automation initiatives
- ★ Strong exposure to regulatory frameworks (Basel, IFRS)

“ AI is not just a technology shift. It is a finance leadership shift. ”