

ChatGPT Deep-Dive Hands-on Bootcamp for CPAs



Presented By
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Learning Objectives



- Recognize the features and benefits of using ChatGPT
- Differentiate the multitude of features available within ChatGPT
- Identify practical applications for ChatGPT in accounting, finance and tax

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Nationally recognized thought leader, advisor, author and speaker on CPA technology

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Strategic technology advisor to the profession w/ 35+ years of experience

Founded and sold two CPA technology advisory startups

Former National Mid-market Technology Partner - BDO

CPA Practice advisor Top 25 Thought Leader for the CPA profession

AICPA Business & Industry Hall of Fame Inductee

Past Chair of the Michigan Association of CPAs

Passionate advocate for the CPA profession!

Presentation Outline

- Generative AI Key Concepts
- ChatGPT Interface Tour
- Advanced Features Review
- Subscription Plan Comparison
- Wrap-up
- Appendix: Accounting / Tax / Finance Case Studies

GENERATIVE AI KEY CONCEPTS



A Simple Generative AI demo with RAG (Retrieval Augmented Generation)



Prompt with RAG

NVIDIA-2025-Annual-Report.pdf
PDF

Calculate the Nvidia 2025 Current Ratio

NVIDIA Fiscal 2025 Current Ratio

Formula
Current Ratio = Current Assets ÷ Current Liabilities

Step 1: Extract Balance Sheet Data

From the Consolidated Balance Sheets (January 26, 2025):

- Total Current Assets: \$80,126 million NVIDIA-2025-Annual-Report
- Total Current Liabilities: \$18,047 million NVIDIA-2025-Annual-Report

Step 2: Calculate

$$80,126 \div 18,047 = 4.44$$

✓ NVIDIA Fiscal 2025 Current Ratio = 4.44

Output

Approximately 90 tokens in total (359 characters / 4 characters per token)

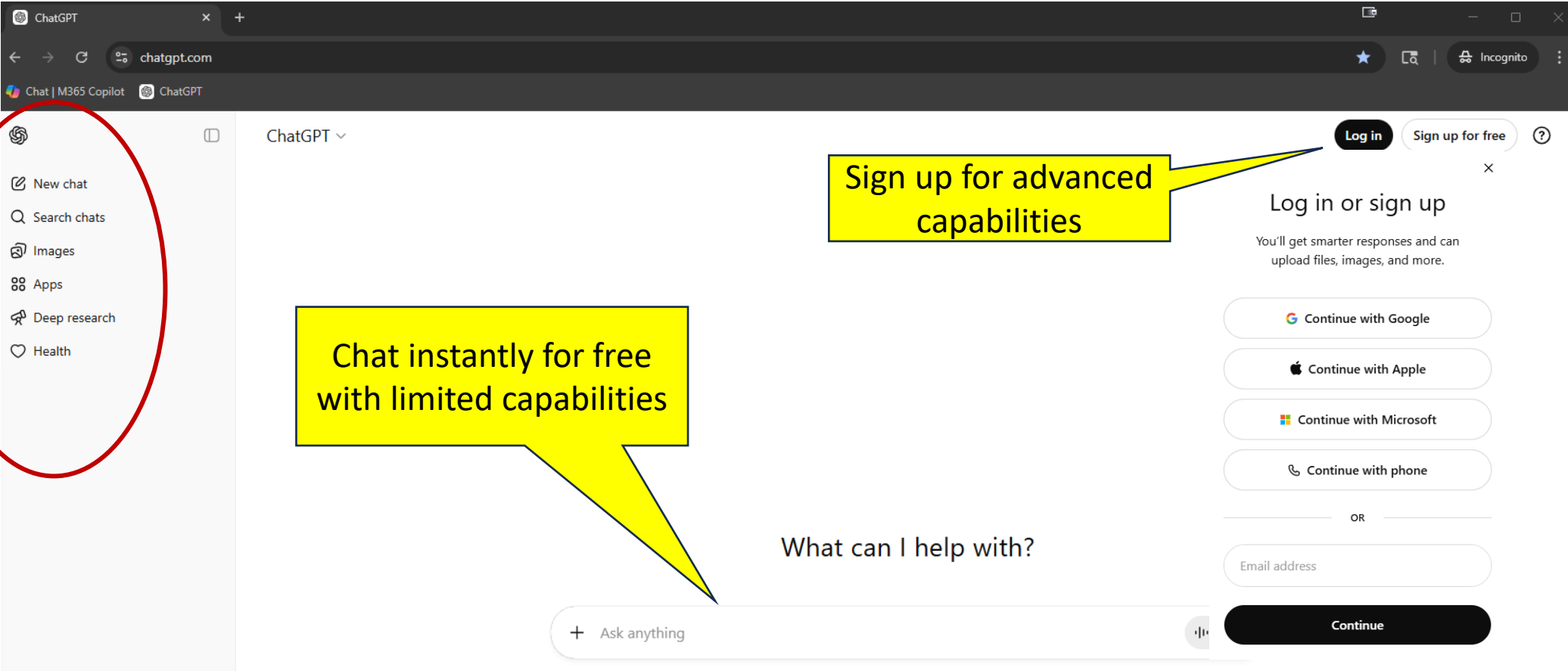
Context window

CHATGPT INTERFACE TOUR

The screenshot displays the ChatGPT interface. On the left is a sidebar menu with the following items: 'New chat', 'Search chats', 'Images', 'Library', 'Apps', 'Deep research', 'Codex', 'GPTs' (with sub-items: 'CPA Course Architect', 'Tax Research GPT', 'Industry Debrief', 'Explore GPTs'), and 'Projects' (with sub-item: 'New project'). The main area shows 'ChatGPT 5.2' at the top left and a user profile icon at the top right. The chat window contains the text 'Where should we begin?' and a text input field with the placeholder '+ Ask anything'. The input field also features a microphone icon and a stop icon.



Getting Started with ChatGPT


<https://chatgpt.com>





New Chat Screen


Hey, John. Ready to dive in?

+ Ask anything  

 Create images

 Learn something

 Write or edit

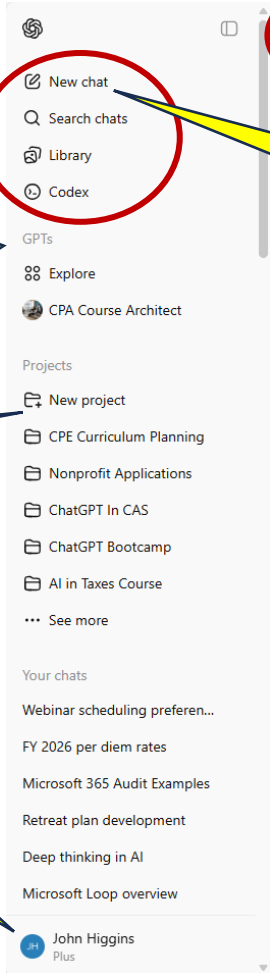
 Step-by-step help

ChatGPT Screenshot

GPTs are standardized – pre-built prompts

Organize chats by project

Account Information



Start a new prompt with an empty context window

Chat History

File upload (RAG) & prompt options

Prompt

Create a shareable link

Create a group chat

Additional features

Generated output

New or continuing prompt entry

Audible input / output

Explain what ETF means in the context of Bitcoin

In the context of Bitcoin, ETF stands for Exchange-Traded Fund.

A Bitcoin ETF is a type of investment fund that is traded on a stock exchange, similar to stocks. It is designed to track the price of Bitcoin (BTC) without requiring investors to actually buy, store, or manage Bitcoin directly.

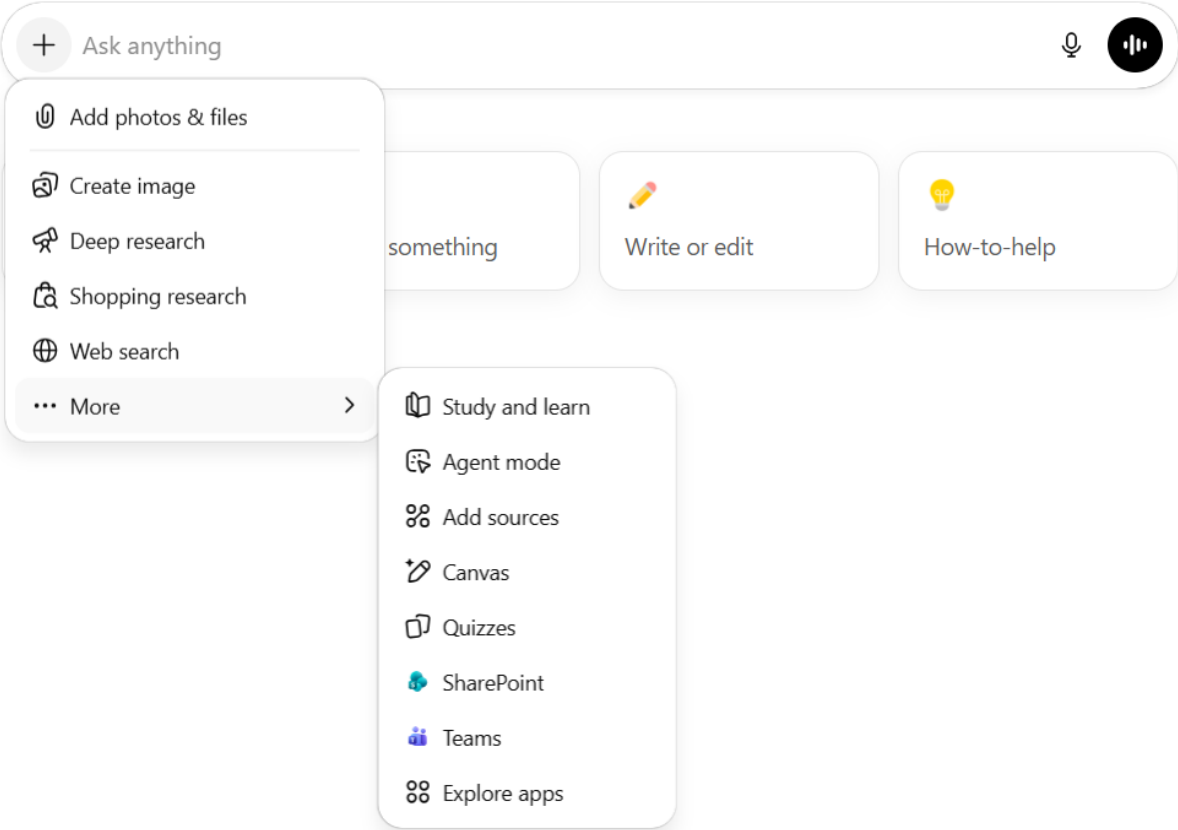
Here is a simple breakdown:

- Structure:** The ETF holds Bitcoin itself (spot ETF) or Bitcoin futures contracts (futures ETF). The value of the ETF shares moves with the price of Bitcoin.
- Purpose:** It allows investors to gain exposure to Bitcoin in a traditional brokerage account, without needing a crypto wallet, private keys, or access to a cryptocurrency exchange.
- Benefits:**
 - Easier access through regular stock market accounts.
 - Professional fund management.
 - Regulated by financial authorities (e.g., U.S. Securities and Exchange Commission – SEC).
 - Avoids direct risks like hacking or mismanaging crypto storage.
- Types of Bitcoin ETFs:**
 - Spot Bitcoin ETF:** Directly holds Bitcoin.
 - Bitcoin Futures ETF:** Invests in Bitcoin futures contracts (agreements to buy/sell Bitcoin at a future date and price).

Example:

- iShares Bitcoin Trust (IBIT) is a spot Bitcoin ETF issued by BlackRock.

ChatGPT Prompt Options



Create Image – Prompt Option

- Describe image you want ChatGPT to create
- Prompt: Create a picture of NHL hockey player Connor McDavid



Deep Research – Prompt Option

Standard Response

Uses general training knowledge
No citations by default
Best for explanations and drafting
Faster and lighter output

Deep Research

Retrieves current web data
Includes source citations
Best for validated research
More comprehensive and structured

Table generated by ChatGPT

Prompt:

You are an expert U.S. tax advisor. I am a CPA tax practitioner. Explain to me, in a bulleted list, the important changes the HR1 (One Big Beautiful Bill) made to depreciation and Section 179 rules and reporting.



Shopping Research – Prompt Option

- Use this option to generate a detailed comparison of products or services before you purchase them.
- Prompt:

You are an expert ERP and accounting software advisor. I am a CPA looking to make a recommendation to my client running a small health and fitness club. Provide a comparison of QuickBooks Online, NetSuite and Intacct for this business.

Web Search – Prompt Option

- Use this option when you want to search the internet for current information.
- Prompt:
Generate a list of high yield dividend stocks on the public exchanges for the month of January 2026. Rank from high to low.



Study and Learn – Prompt Option

- Use this option when you want to have a dialogue with ChatGPT to learn about a topic.
- Prompt:
Help me learn to understand precisely how the bitcoin mining process works.



Agent Mode – Prompt Option

- Use this option when you want to automate a process.
- Prompt:

Create a ChatGPT agent using Python that can look at a stock price for a particular equity daily. Pull the price from Yahoo Finance and then update an excel workbook file and add a row to update with the stock price information each day.



ADVANCED FEATURES REVIEW



ChatGPT Advanced Features

- Projects
- Account Settings
- Connections
- Custom GPTs

ChatGPT Projects Feature

The screenshot displays the ChatGPT interface with the 'Create project' dialog box open. On the left sidebar, the 'New project' option is highlighted with a red circle. The dialog box features a text input field containing 'Copenhagen Trip', a settings gear icon, and a close 'X' icon. Below the input field are four category buttons: 'Investing' (green dollar sign), 'Homework' (blue graduation cap), 'Writing' (purple quill), and 'Travel' (yellow star). A microphone icon is visible on the right side of the dialog. A light gray box contains the text: 'Projects keep chats, files, and custom instructions in one place. Use them for ongoing work, or just to keep things tidy.' At the bottom right of the dialog is a 'Create project' button.

Understanding ChatGPT Projects

Workspace to manage a collection of related prompts / responses

Chat context shared across the project

RAG shared across the project

Project specific instructions override account custom instructions

Optional project specific memory access

Account Settings

- ✕
- ⚙️ General
- 🔔 Notifications
- 🔄 Personalization
- 📱 Apps
- 🕒 Schedules
- 📅 Orders
- 🔒 Data controls
- 🔐 Security
- 👤 Parental controls
- 👤 Account

General

- Appearance System ▾
- Accent color ● Default ▾
- Language Auto-detect ▾
- Spoken language Auto-detect ▾
For best results, select the language you mainly speak. If it's not listed, it may still be supported via auto-detection.
- Voice ▶ Play | Maple ▾
- Separate Voice
Keep ChatGPT Voice in a separate full screen, without real time transcripts and visuals.
- Show additional models



Account Settings Explained



Personalization Settings Explained

Data Control Settings

×

- General
- Notifications
- Personalization
- Apps
- Schedules
- Orders
- Data controls**
- Security
- Parental controls
- Account

Data controls

Improve the model for everyone Off >

Remote browser data On >

Shared links Manage

Archived chats Manage

Archive all chats Archive all

Delete all chats Delete all

Export data Export



Data Control
Settings
Explained

ChatGPT “Connections”

The screenshot displays the ChatGPT settings interface. On the left, a sidebar menu contains several options: General, Notifications, Personalization, **Apps** (highlighted with a red circle), Schedules, Orders, Data controls, Security, Parental controls, and Account. The main content area is titled 'Enabled apps' and includes a sub-header 'Manage enabled apps ChatGPT can use in your chats.' and an 'Add more' button. Below this, a list of enabled apps is shown, each with an icon and a right-pointing arrow: Outlook Calendar, Outlook Email, Quizzes, SharePoint, Teams, and Advanced settings.

ChatGPT “Connections”

Connects ChatGPT to external / 3rd party applications

Requires authenticated login to external app

Connected app data serves as persistent RAG

Connected data does NOT train the ChatGPT model

Connection honors the 3rd party apps data governance







GPTs

Discover and create custom versions of ChatGPT that combine instructions, extra knowledge, and any combination of skills.

- Top Picks
- Writing
- Productivity
- Research & Analysis
- Education
- Lifestyle
- DALL-E
- Programming

Writing

Enhance your writing with tools for creation, editing, and style refinement

- | | | | |
|---|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 |  <p>AI Humanizer
#1 AI humanizer in the world 🏆 Get human-like content in seconds with Free credits. This GPT humanizes AI-generated...
By mmchdigital.solutions</p> | 2 |  <p>Song Maker GPT - Create Your AI Music
AI Music & Song Creator: Transform Your Musical Ideas into Professional Songs! Generate Custom Music and Original Son...
By community builder</p> |
| 3 |  <p>ChatPRD - AI for Product Managers
An on-demand Chief Product Officer that drafts and improves your PRDs, while coaching you to become an elite product...
By community builder</p> | 4 |  <p>Unbound Limitless Story Writer
Writes stories
By MOHAMED BENALI BENDAHMANE</p> |
| 5 |  <p>Fully SEO Optimized Article including FAQ's (3.0)
Generate 2000+ Words SEO articles and blog posts with images, and multilingual content in customizable formats.
By writer-gpt.com</p> | 6 |  <p>Grammar Checker
Instantly corrects grammatical mistakes with this Grammar Checker. Pinpoints grammatical errors, spelling mistakes, and...
By studyx.ai</p> |

ChatGPT “GPTs”

A pre-configured chat with permanent instructions

Persistent uploaded documents for context / RAG

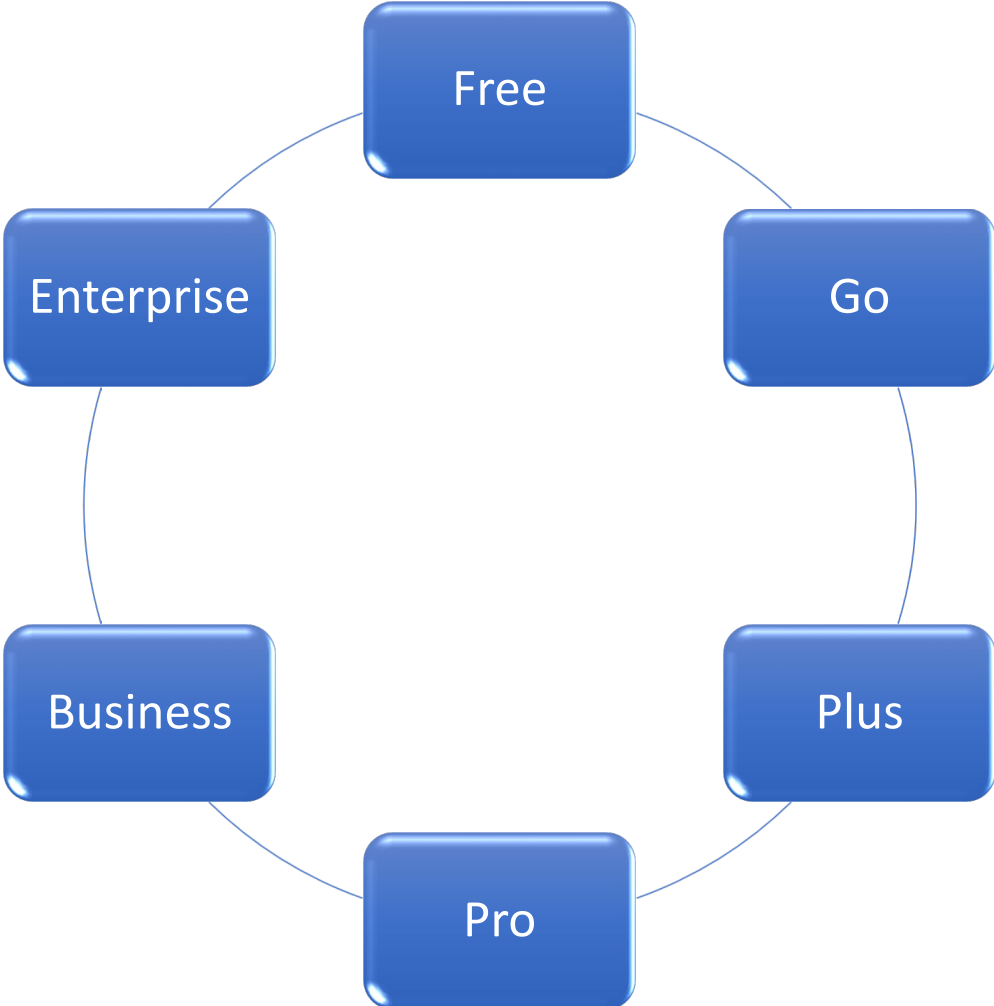
Optional integration to 3rd party apps

Standardized response format

Provides consistency across users

Shareable within organization and publicly

SUBSCRIPTION PLAN COMPARISON



Individual Based Subscription Plans

<p>Free Intelligence for everyday tasks</p> <p>\$0 / month</p> <p>Get Free ↗</p> <ul style="list-style-type: none"> ✓ Limited access to flagship model GPT-5.2 ✓ Limited messages and uploads ✓ Limited and slower image generation ✓ Limited deep research ✓ Limited memory and context <p>Have an existing plan? See billing help</p>	<p>Go Keep chatting with expanded access</p> <p>\$8 / month</p> <p>Get Go ↗</p> <p>✦ Everything in Free and:</p> <ul style="list-style-type: none"> ✓ More access to our flagship model GPT-5.2 ✓ More messages ✓ More uploads ✓ More image creation ✓ Longer memory <p>This plan may include ads. Learn more</p>	<p>Plus Do more with advanced intelligence</p> <p>\$20 / month</p> <p>Get Plus ↗</p> <p>✦ Everything in Go and:</p> <ul style="list-style-type: none"> ✓ Advanced reasoning models ✓ Expanded messages and uploads ✓ Expanded and faster image creation ✓ Expanded deep research and agent mode ✓ Expanded memory and context ✓ Projects, tasks, and custom GPTs ✓ Codex agent and Sora video generation ✓ Early access to new features 	<p>Pro Full access to the best of ChatGPT</p> <p>\$200 / month</p> <p>Get Pro ↗</p> <p>✦ Everything in Plus and:</p> <ul style="list-style-type: none"> ✓ Pro reasoning with GPT-5.2 Pro ✓ Unlimited GPT-5.2 and file uploads ✓ Unlimited and faster image creation ✓ Maximum deep research and agent mode ✓ Maximum memory and context ✓ Expanded projects, tasks, and custom GPTs ✓ Expanded access to Sora video generation ✓ Expanded, priority-speed Codex agent ✓ Research preview of new features <p>Unlimited subject to abuse guardrails. Learn more</p>
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Entity Based Subscription Plans

Business

A secure, collaborative workspace for startups and growing businesses

Annual billing

Monthly billing

\$25 / user / month billed annually

Try for free >

🔗 Everything in Plus and:

- ✓ Unlimited GPT-5.2 messages, with generous access to GPT-5.2 Thinking, and access to GPT-5.2 Pro—plus the flexibility to add credits as needed
- ✓ 60+ apps that bring your tools and data into ChatGPT—like Slack, Google Drive, SharePoint, GitHub, Atlassian, and more
- ✓ A secure, dedicated workspace with essential admin controls, SAML SSO, and MFA
- ✓ Support for compliance with GDPR, CCPA, and other privacy laws. Aligned with CSA STAR and SOC 2 Type 2
- ✓ Business features like apps, data analysis, record mode, canvas, shared projects, and custom workspace GPTs
- ✓ Encryption at rest and in transit, and no training on your business data by default. [Learn more](#)
- ✓ Includes access to Codex and ChatGPT agent for reasoning and taking action across your documents, tools, and codebases

Enterprise

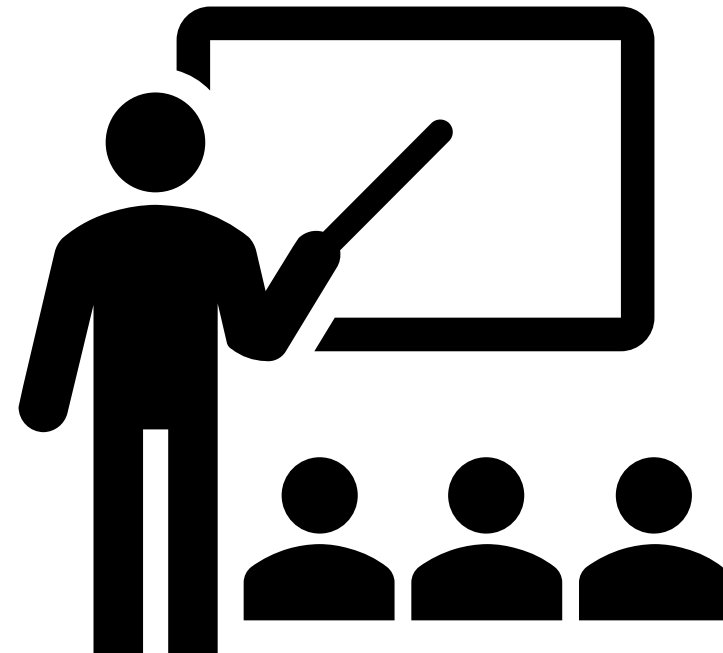
Enterprise-grade AI, security, and support at scale

Contact sales >

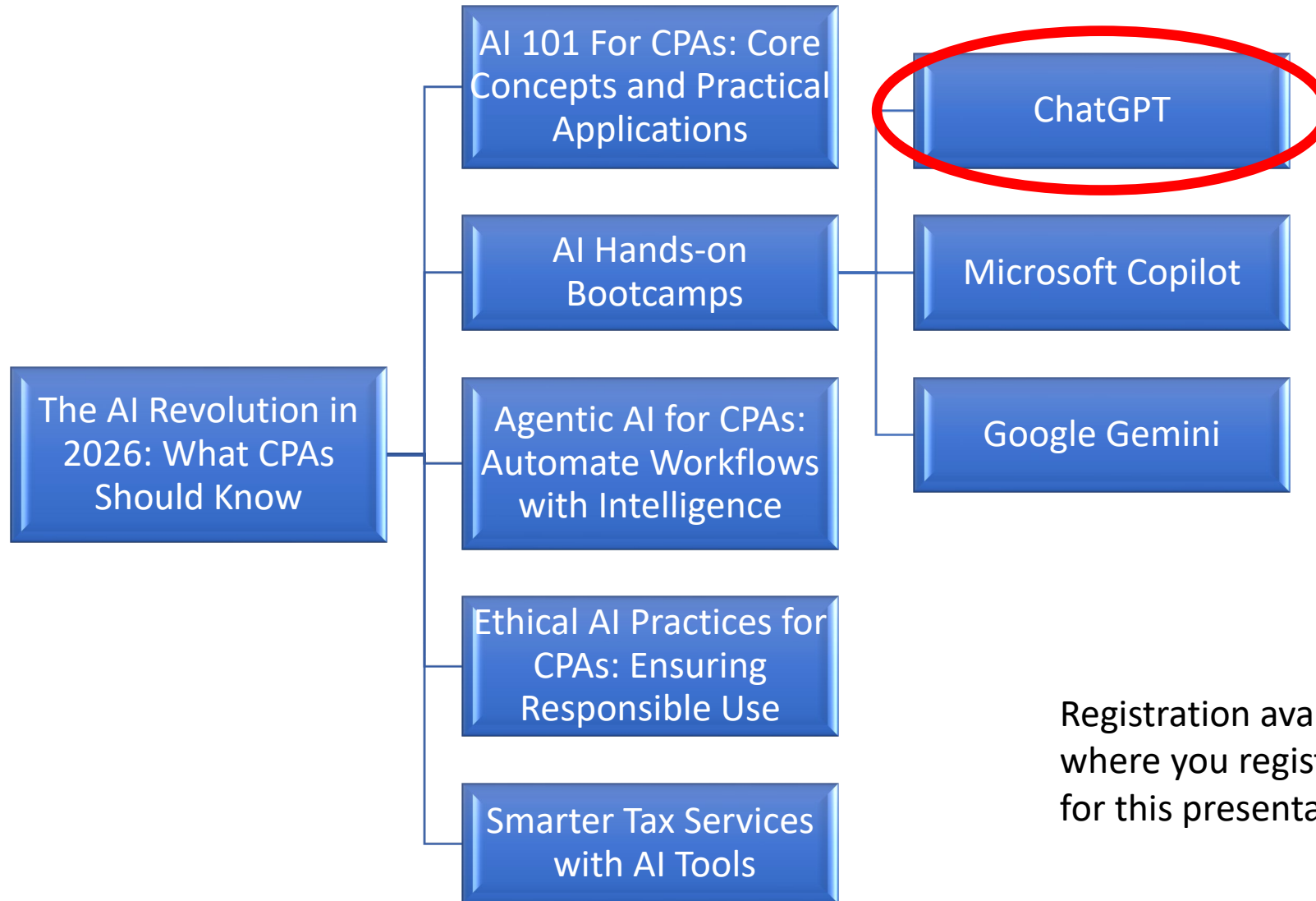
🔗 Everything in Business and:

- ✓ Expanded context window that supports longer inputs and larger files
- ✓ Enterprise-level security and controls, including SCIM, EKM, user analytics, domain verification, and role-based access controls
- ✓ Advanced data privacy with custom data retention policies, encryption at rest and in transit, and no training on your business data by default. [Learn more](#)
- ✓ Support for data residency in ten regions
- ✓ 24/7 priority support, SLAs, custom legal terms, and access to AI advisors (eligible customers)
- ✓ Invoicing and billing, volume discounts

WRAP-UP



2026 Higgins Advisory AI Curriculum



Registration available where you registered for this presentation

In Summary

- Applications of ChatGPT can range from simple to extremely complex
- Experiment with the many features that we covered today
- Use ChatGPT as much as possible to develop your skills at leveraging the power of generative AI
- ***Build you knowledge, build your value***

Questions ?



Thank you!!!

Let's connect on LinkedIn →



APPENDIX: ACCOUNTING / TAX / FINANCE

CASE STUDIES



Case Study 1: Tax Research

- Scenario: You are asked by a client to explain the tax treatment of cryptocurrency staking rewards.

Case Study 1: Tax Research



Prompt example

Prompt:

- Act as a professional tax advisor.
- The audience is a non-financial taxpayer.
- Prepare a summary explanation of the tax treatment of cryptocurrency staking.
- Keep the tone professional, less than 500 words, in a bulleted list, in memo format, provide citations, write at the 10th grade level.

Case Study 2: Communications / Content Generation

- Scenario: You need to present the highlights of the University of Notre Dame's FY2025 financial statements to the Board of Trustees.

Case Study 2: Communications / Content Generation



Prompt example

Prompt:

- Act as a professional communications coach to accounting and finance professionals.
- The audience is the Board of Trustees of the University of Notre Dame. They are a combination of clergy and lay people. They may or may not be financial reporting savvy.
- Prepare a timed outline for a 45-minute presentation on the FY 2025 audited financial statements.
- Keep the tone professional. Format in a bulleted list. Suggest potential charts and graphs to enhance the presentation. Compose at the undergraduate college reading level.
- The FY 2025 Audited financial statements are added as RAG.

Case Study 3: Document Analysis

- Scenario: Analyze the terms of an office lease agreement for your client or company and provide an opinion on the quality, or lack thereof, of the lease agreement.

Case Study 3: Document Analysis



Prompt example

Prompt:

- Act as a legal expert specializing in commercial real estate agreements.
- The audience is a potential lessee of a commercial office. Assume the lessee is not versed in the legalities of a lease agreement.
- Prepare a summarized analysis of the lease agreement to identify any lease terms that are detrimental to the lessee, as well as any missing terms that should be added to the agreement. Include an executive summary with your opinion of the quality of the lease from the perspective of the lessee.
- Keep the tone professional. Format in a bulleted list. Compose at the 10th grade reading level.
- An actual lease agreement will be added as RAG.

Case Study 4: Data Analysis

- Scenario: Analyze the annual reports of four major AI technology companies to understand the financial strengths and weaknesses of them comparatively.

Case Study 4: Data Analysis



Prompt example

Prompt:

- Act as an expert financial analyst.
- The audience is a professional financial advisor who advises clients on financial planning and wealth management issues.
- Analyze the annual reports of these four AI technology leaders and provide a comparative analysis of financial strengths and weaknesses of each of them relative to the others. Include an executive summary of each company's financial performance and position.
- Keep the tone professional. Format as comparative tables. Create charts and graphs as appropriate. Compose at the 10th grade reading level. Provide definitions of any complex financial terms or metrics.
- Actual annual report files will be added as RAG.

Case Study 5: Workflow Automation

- Scenario: Create an agent to provide an executive summary of a specified industry to prepare the CPA business advisor to be conversant with the management team of a business in the specified industry.

Case Study 5: Workflow Automation



Prompt example

Prompt:

- Act as an expert industry research assistant.
- The audience is a CPA business advisor who will be meeting with the management team of a business within the specified industry.
- Provide a macro level executive summary to prepare the CPA business advisor to meet with company representatives. Prompt the user for key information related to the industry. Use industry resources to inform on the key aspects of operating a business within the industry.
- Keep the tone professional. Format with bullet points, tables and charts, as appropriate. Create charts and graphs as appropriate. Compose at the 10th grade reading level. Provide definitions of any nomenclature related to the industry as well as key financial metrics.

Case Study 6: Innovation / Brainstorming

- Scenario: Develop the framework for a strategic planning retreat for a 50 person CPA firm to develop an effective and responsible AI adoption plan for the firm.

Case Study 6: Innovation / Brainstorming



Prompt example

Prompt:

- Act as a strategic planning facilitator for accounting and advisory firms.
- The audience is the leadership team of a 50 person CPA firm responsible for designing an effective AI adoption planning retreat for the firm.
- Develop a comprehensive plan for a one-day retreat with the goal of having a comprehensive framework for the firm to adopt an AI implementation plan that is effective, efficient and safe. Create a timed agenda, define the methodology for capturing thoughts and ideas and organizing them into a manageable format that facilitates synthesizing them into actionable initiatives. Define specific deliverable outcomes for the event.
- Keep the tone professional. Format as a timed agenda for the event. Identify the specific roles and responsibilities. Develop a series of thought-provoking questions to encourage input and feedback from all participants. Recommend documentation procedures.