

Your analysts already pay for AI. In two days they will build with it.

A hands-on AI programme for investment teams: sourcing, modelling, diligence, memos. Built from 75-minute modules, run on public data, delivered by the engineer who writes the code. Prices on this page, the programme as a PDF, an invoice with a NIP.

Provider	Maksym Huczyński, H2M sp. z o.o.
Format	Workshop, on site at the client's office or remote
Group	4 to 12 people
Duration	4 modules of 75 minutes; 6 godziny dydaktyczne (45 min); 5 clock hours of teaching plus breaks, 9:00 to 15:00
Date	To be agreed
Target group	The analyst and the associate; The partner and the CFO; The person who will own it
Objective	After the training the participant independently sets up a working environment with Claude, runs a repeatable analysis of transaction materials, generates and verifies formulas and model logic, and applies the fund's written data-security rules.

Agenda

The core day is the priced unit. Tracks A, B and C extend it into the two-day programme and the cohort.

Core day, 4 modules

Every participant. No programming background needed.

M1 · Your desk: Claude, Claude Code, the Excel add-in, plans and permissions · 75 min

Outcome: A working setup (or the browser sandbox if IT says no) and a written note of which plan may see which data

M2 · Prompting for analysts: structure, context, repeatability · 75 min

Outcome: A prompt library for the five tasks your desk repeats, committed to the fund repository

M3 · Working with financial data: xlsx, csv, pdf; pulling data from KRS and the financial statements repository · 75 min

Outcome: Three years of a listed company's PDF report parsed into a tidy csv, with a check that totals reconcile

M4 · Case workshop: from data to artefact (model skeleton, investment note or VDR gap list, the group chooses) · 75 min

Outcome: One finished artefact per participant in the shared repository

Track A, modelling and sourcing, 5 modules

Second day of the two-day programme. Prerequisite: the core day and a three-statement model built by hand at least once.

A1 · Sourcing and pre-screening with KRS OpenAPI and web search · 75 min

Outcome: A screen of Polish companies in one PKD class, ranked by revenue growth from public statements

A2 · Excel automation and complex formulas · 75 min

Outcome: An iterative revolver and cash sweep formula set, circularity switch included, explained back

A3 · LBO business logic: tranches, amortisation, returns bridge · 75 min

Outcome: A debt schedule with three tranches and a returns bridge on a public target

A4 · Sensitivity and Monte Carlo in the sandbox · 75 min

Outcome: A 10,000-path Monte Carlo on entry multiple, exit multiple and EBITDA growth, charted, with a written read of the tail

A5 · Memory, context and the deal folder · 75 min

Outcome: A CLAUDE.md and folder convention for one live deal, so context is reproducible

Track B, diligence and documentation, 5 modules

Alternative second day. Prerequisite: the core day.

B1 · Cleaning chaotic financials and standardising statements · 75 min

Outcome: Five Polish statement layouts from the KRS repository normalised into one schema, with a reconciliation report

B2 · Contracts: scanning for unfavourable clauses · 75 min

Outcome: A risk table with citations to clause numbers, from a checklist the fund owns

B3 · VDR gap detection · 75 min

Outcome: The missing-item list and the follow-up email, from a request list and a folder tree

B4 · Investment memo and deck from the model · 75 min

Outcome: A three-page IC memo and a ten-slide deck with every number traceable

B5 · Deal documents: NDA, term sheet, SHA, SPA · 75 min

Outcome: A redline with a rationale column and a position log the lawyer can read

Track C, portfolio and exit, 2 modules

Usually the remote continuation after the programme.

C1 · Portfolio monitoring and automatic summaries · 75 min

Outcome: A scheduled job that reads a monthly reporting pack and writes a one-page variance summary with a flag list

C2 · Exit: buyer lists and sale materials · 75 min

Outcome: A buyer long list from public registers and filings, plus a teaser draft

Learning outcomes

- A shared git repository with everything the team built, with history, owned by you
- A prompt library for the five tasks your desk repeats
- A working local setup, or a browser sandbox if IT says no, for every participant
- A checked LBO skeleton, or a diligence request list and a clause checklist, depending on the track
- A one-page data rule: what may be pasted, what must be redacted, what stays offline
- A one-page automation roadmap for the quarter, with named owners
- A certificate per participant with the title, the dates and the hours, for the L&D file

Methods

Methods	Hands-on workshop at computers, public data only, a shared git repository, no lecture segment longer than 10 minutes per module.
Materials and tools provided by the provider	Access to the prompt library per participant, API tokens for the workshop, a shared git repository handed over to the client, a prompt library.
Verification of outcomes	Every module ends with an artefact committed to the repository, which is the proof of completion. Every generated memo, redline or valuation is a draft for a human to sign.
Certificate	A named certificate with the training title, dates and number of hours (a private certificate, not a state-issued <i>zaswiadczenie</i>).

Trainer

Maksym Huczyński, AI engineer, H2M sp. z o.o., Warsaw

Maksym ships production agent systems, not slideware: a Slack-native AI operator for a 25-person agency, thirteen published distillation experiments including the results that failed, and the public reference collection of production system prompts with 6,208 stars on GitHub.

He writes the roadmap, the code and the reply to your brief.

[placeholder: 2 to 4 sentences of biography, reference projects, publications]

Prices (net, 23% VAT, gross)

Core day

9,000 PLN net · 11,070 PLN gross (23% VAT) · per group of up to 12

Four 75-minute modules. Everyone leaves with a working setup, a prompt library for their desk, a written data rule and one finished artefact, all in a shared repository that stays yours.

Two-day programme (recommended)

16,000 PLN net · 19,680 PLN gross (23% VAT) · per group of up to 12

The core day plus one track (modelling and sourcing, or diligence and documentation), same group, eight modules. This is the fund's full analyst programme.

Cohort with the portal

from 32,000 PLN net · from 39,360 PLN gross (23% VAT) · up to 12 people, 6 weeks

The core day, a track day, then four weeks of one remote module per week on your real work. Between sessions the team has the portal: tasks, the knowledge base, recordings, a support queue with a stated response time, and the sandbox.

1:1 track

1,200 PLN net per session · 1,476 PLN gross (23% VAT); five for 5,500, ten for 10,000 PLN net · 60 minutes, on your live file, under NDA

For the partner or the CFO who will not sit in a group. We work on your live file, under NDA, and you finish the thing you came with.

Prices are per group of up to 12 people unless stated per session. Travel and accommodation outside Warsaw at cost.

All prices net; 23% VAT applies because H2M is a commercial company and this training is not publicly funded. Travel and accommodation outside Warsaw at cost. Group sessions run on public data only; the 1:1 track may touch live deal data under NDA.

Data security

Does deal data train the model

Under Anthropic's commercial terms, Claude for Work, Team, Enterprise and the API exclude inputs and outputs from training by default. Consumer Free and Pro plans now default to training unless the user opts out. That is why deal work does not run on a personal Pro account.

Retention

Standard API retention versus a zero-data-retention arrangement, negotiated with Anthropic per organisation. If the fund wants ZDR, that conversation starts before the workshop.

Which plan

Team or Enterprise for the fund, with SSO, audit logs and a DPA. The workshop itself runs on H2M tokens and public data, so no deal data touches a trainer-controlled account.

NDA

Mutual NDA before the scoping call. Group sessions never touch live deal data; the 1:1 track may, and that is what the NDA covers.

Listed targets

If a participant brings a live listed target, the exercise switches to public data. A rule of the room.

Outputs

Every generated memo, redline and valuation is a draft for a human to sign. This sentence is in the programme document.

Recordings

Decided before day one. If recorded, sessions live in the portal, access-controlled, deleted on request.

FAQ

How many hours is it?

The core day is 4 modules of 75 minutes: 300 minutes of teaching, which is 6 godziny dydaktyczne of 45 minutes, or 5 clock hours, plus breaks, 9:00 to 15:00. The programme PDF states both counts so your form is unambiguous.

What is the net and gross price?

Core day 9,000 PLN net, 11,070 PLN gross (23% VAT). Two-day programme 16,000 PLN net, 19,680 PLN gross (23% VAT). A 1:1 session 1,200 PLN net, 1,476 PLN gross (23% VAT). Cohort from 32,000 PLN net.

Why 23% VAT?

H2M is a commercial company, not an institution within the education system, and this training is not financed from public funds, so the standard rate applies. If you fund it from KFS, tell me before the invoice: at 70% or more public funding the service becomes VAT-exempt and the paperwork changes.

Is there a link to the programme for the request form?

Yes: a permanent URL and a PDF with the title, the hours, the agenda per module, the outcomes, the trainer, the price net and gross, and our registration data. No expiry, no login, no form.

What are the provider details?

H2M sp. z o.o., Warsaw, NIP 5252680451; KRS and REGON on the PDF; PKD 85.59.B.

Do you issue a certificate?

Yes, per participant, with the title, dates and hours. It is a private certificate rather than a state-issued *zaswiadczenie*, which is normal for a commercial provider and sufficient for an internal L&D file.

Invoice and payment?

One VAT invoice after the last day, 14-day terms, or 50% on booking for the cohort. Your purchase order number on the invoice if you need it.

Do you sign an NDA?

Yes, before the brief. Group sessions run on public data only. The 1:1 track may touch your live deal data, and that is exactly what the NDA covers.

Provider registration data

H2M sp. z o.o.	5252680451
NIP	[placeholder]
KRS	[placeholder]
REGON	85.59.B
PKD	[adres], Warszawa
Adres / Address	maksym@h2mai.com
Email	h2mai.com
WWW	90 days from the date on this document
Valid	2026-09-17
Issued	maksym@h2mai.com · https://h2mai.com/training/ai-for-investment-teams
Contact	