AI-Driven Finance: The New Frontier

Transforming finance from reactive reporting to proactive strategy through artificial intelligence

by Glenn Hopper
Head of AI Research & Design
Eventus Advisory Group

Redefining Finance for the AI Era

Beyond Recording

Finance now anticipates and advises

From Hindsight to Foresight

AI enables predictive financial insights

Strategic Intelligence

Focus on strategic impact, not just efficiency

The New Frontier of Finance

Traditional Approach

Reporting → Budgeting → Variance Analysis

Manual data processing
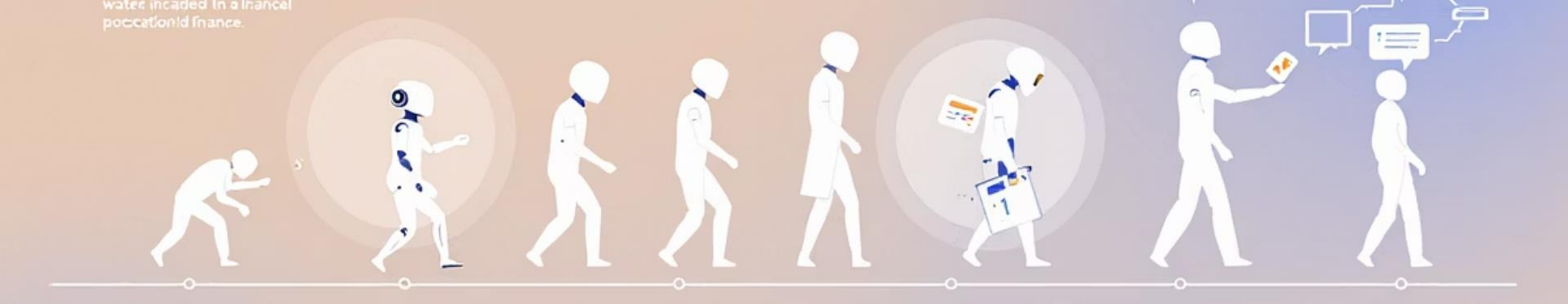
Reactive decision-making

AI-Augmented Approach

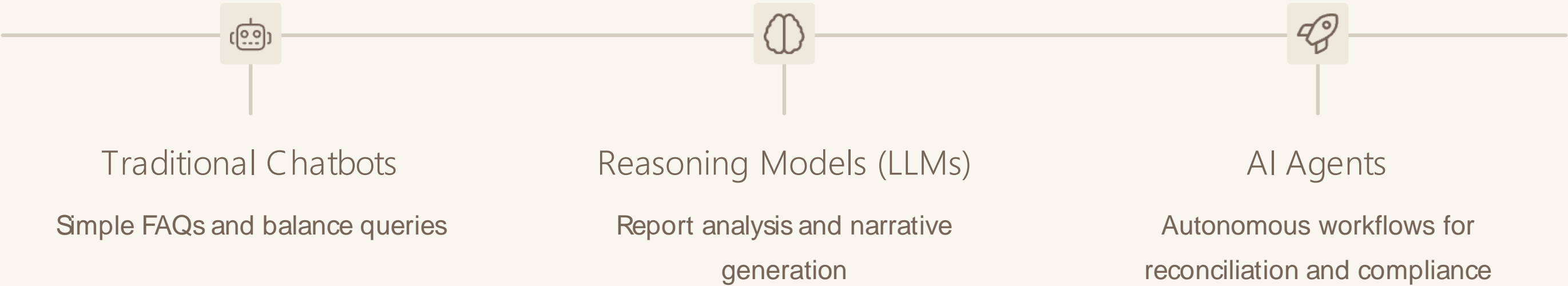Simulation → Scenario Design → Real-Time Strategy

Automated insight generation

Proactive strategic planning

AI Evolution in Finance

Traditional Chatbots

Simple FAQs and balance queries

Reasoning Models (LLMs)

Report analysis and narrative generation

AI Agents

Autonomous workflows for reconciliation and compliance

Current AI Solutions in Finance

PwC's Agent OS

Agent-based workflows streamline reporting and audit processes

Visa Transaction Agents

AI executing complex financial transactions with reduced oversight

Microsoft 365 Copilot

Embedded AI for forecasting and dynamic budget creation

Strategic Use Cases for AI in Finance

Predictive Forecasting

Real-time planning with dynamic variables

Risk Modeling

Advanced scenario analysis for risk mitigation

M&A Screening

AI-powered target identification and valuation

Macroeconomic Testing

Simulate market changes and variance impacts

Live Demo: AI Financial Analysis

Research & Data Collection

ChatGPT Deep Research summarizes Apple's 10-K

Financial Analysis

Extract KPIs and visualize trends with Code Interpreter

Content Creation

Draft board-ready "Initiating Coverage" summary

Publication

Generate professional microsite using Manus

Time Efficiency of AI-Powered Analysis

3 days

Traditional Analysis

Full team required

20 min
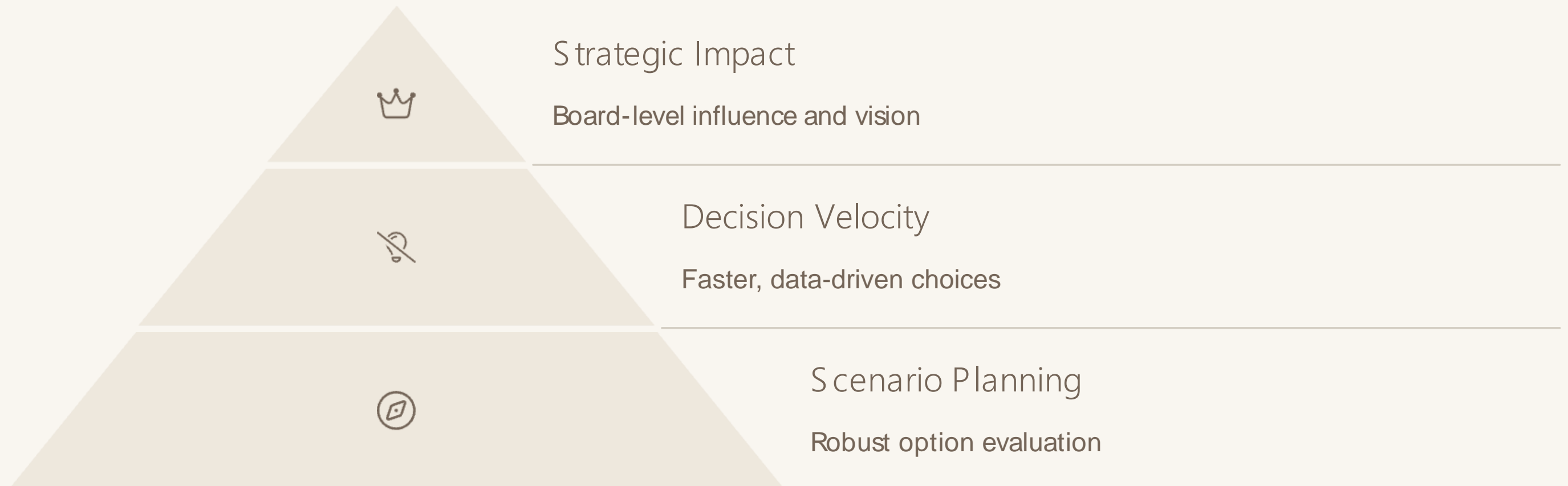
AI-Enhanced Analysis

One skilled analyst with AI tools
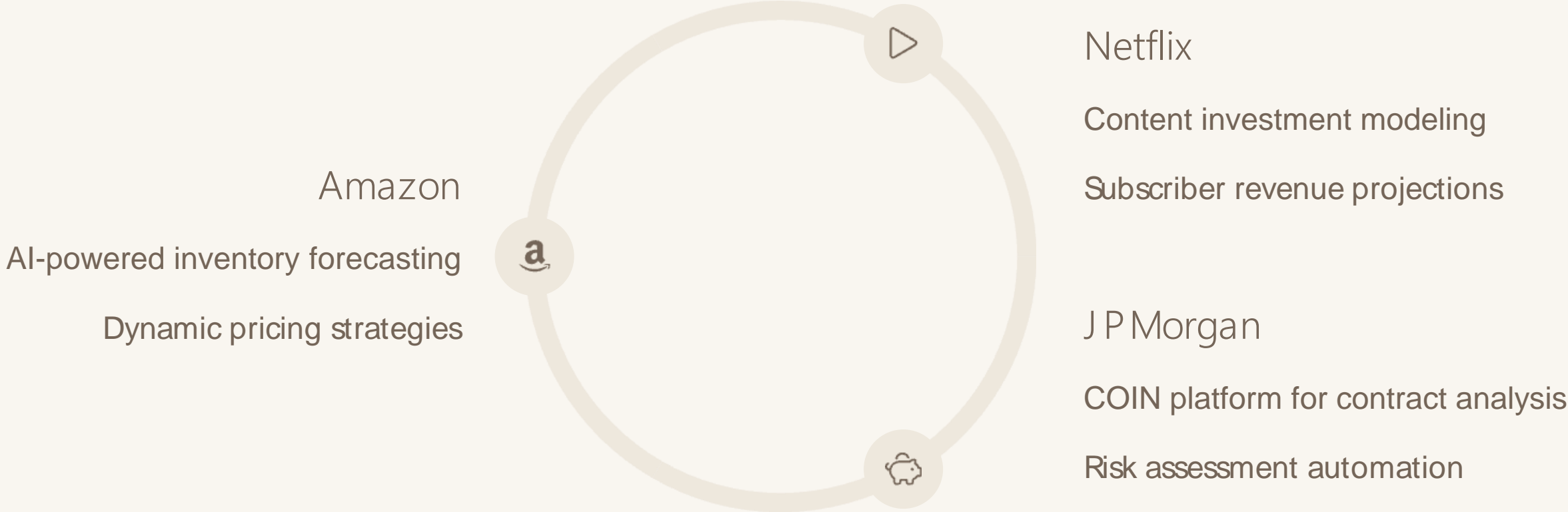
89%

Time Savings

Faster insights for critical decisions

Strategic Advantages of AI in Finance

Strategic Impact
Board-level influence and vision

Decision Velocity
Faster, data-driven choices

Scenario Planning
Robust option evaluation

Industry Leaders in AI Finance

Netflix

Content investment modeling

Subscriber revenue projections

Amazon

AI-powered inventory forecasting

Dynamic pricing strategies

J P Morgan

COIN platform for contract analysis

Risk assessment automation

Getting Started with AI in Finance

Select High-Leverage Use Case

Board reporting or strategic forecasting

Deploy Secure Enterprise Tools

ChatGPT Pro, Manus with proper safeguards

Establish Validation Loops

AI drafts, humans review and refine

Building AI Capabilities

AI Fluency Training
Foundational AI concepts for finance

Effective Prompting
Techniques to maximize AI output quality

Integration Skills
Connecting AI insights to workflows

Financial Data Literacy
Understanding data structures for AI use

AI Implementation Timeline

Pilot Project
Select single use case

Team Expansion
Train additional analysts

Process Integration
Embed in core workflows

Enterprise Scale
Company-wide adoption

Key Takeaways

🚀 **Strategic Accelerator**

AI goes beyond automation to strategic advantage

⚡ **Insight Velocity**

Faster, more accurate financial decision-making

👥 **Team Empowerment**

Augmenting human expertise, not replacing it

🏁 **Start Now**

Begin with high-impact use cases for immediate value