

“AI” - f i c a t i o n o f f i n a n c i a l s e r v i c e s



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A Quick AI 101

The Various Types

Predictive ML

- Text analysis
- Data extracts
- Predictions
- Rule-based

Pre-GPT

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Generative AI

- Data summarization
- Code generation
- Contextual conversations
- “Multi-modal”

GPT era

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Generative AI

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GPT era

General Intel

- Deeper contexts
- Persistent memory
- System 2 reasoning
- Proactive rather than reactive

FUTURE

A Quick AI 101

Why now?

Competent LLMs



Traction

ChatGPT

midjourney

AI Hype-train



Potential



A Quick AI 101

Why now?

Competent LLMs



Traction

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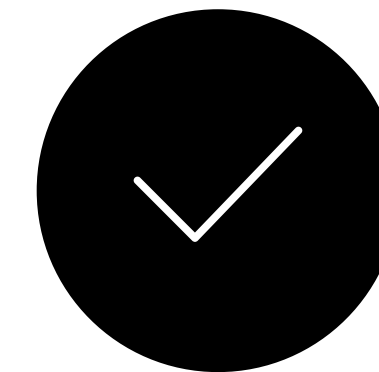
AI Hype-train



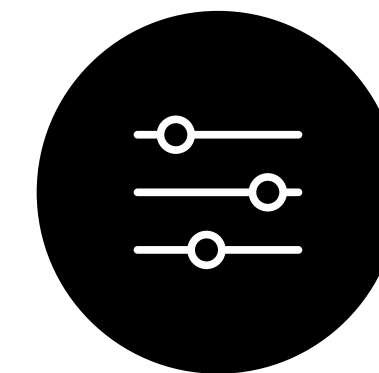
Potential



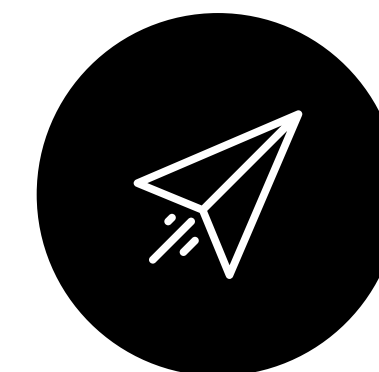
Who benefits?



Data-rich



Compliance-driven



Product-led

Gen AI in Finance **today**

PERSONAL FINANCE

 Monarch



RISK & COMPLIANCE





DEV TOOLS



CUST. SUPPORT







INTERNAL PROCESS





Gen AI in Finance **tomorrow**

PERSONAL FINANCE



CUST. SUPPORT



RISK & COMPLIANCE



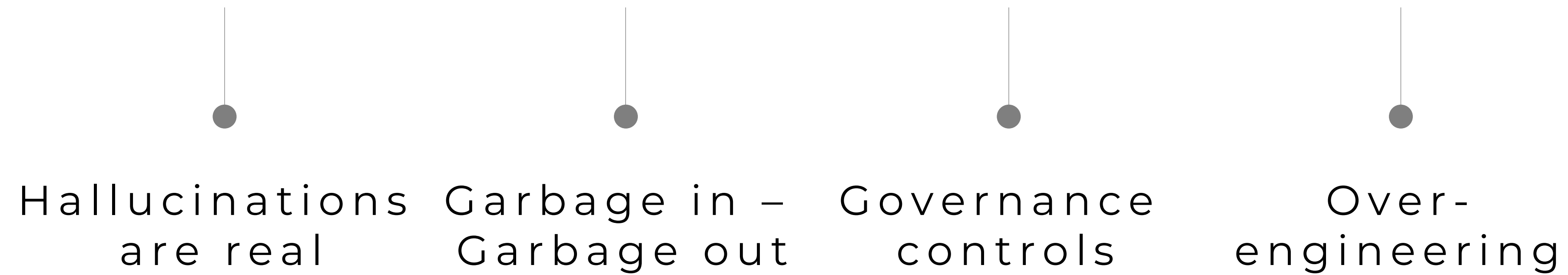
INTERNAL PROCESS



DEV TOOLS



A word of **caution**



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Look for critical, manually
intensive tasks that AI can solve

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Experiment

Create iterative proof of
concepts for the viable use cases

F i n d m e o n :
X : @ a d h i k a r b
