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WELCOME

# **A.I. in the Workplace for Financial Executives**



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## A.I. in the Workplace for Financial Executives



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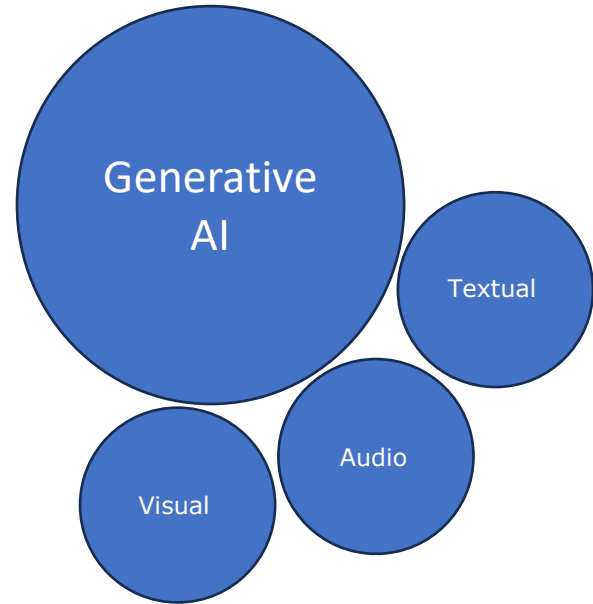
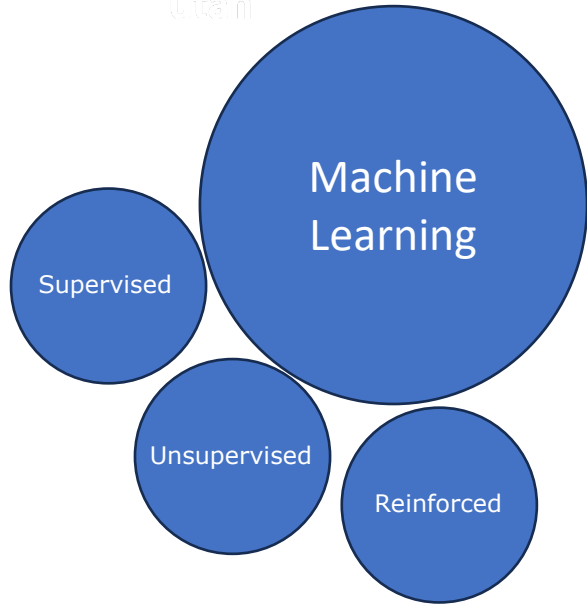
Founder & CEO  
Advisory Zone

# Types of AI



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# Elements of AI

Security

Knowledge & Expertise

Public Data

Public Tools

Public Algorithms

Private 3<sup>rd</sup> Party Data

3<sup>rd</sup> Party Tools

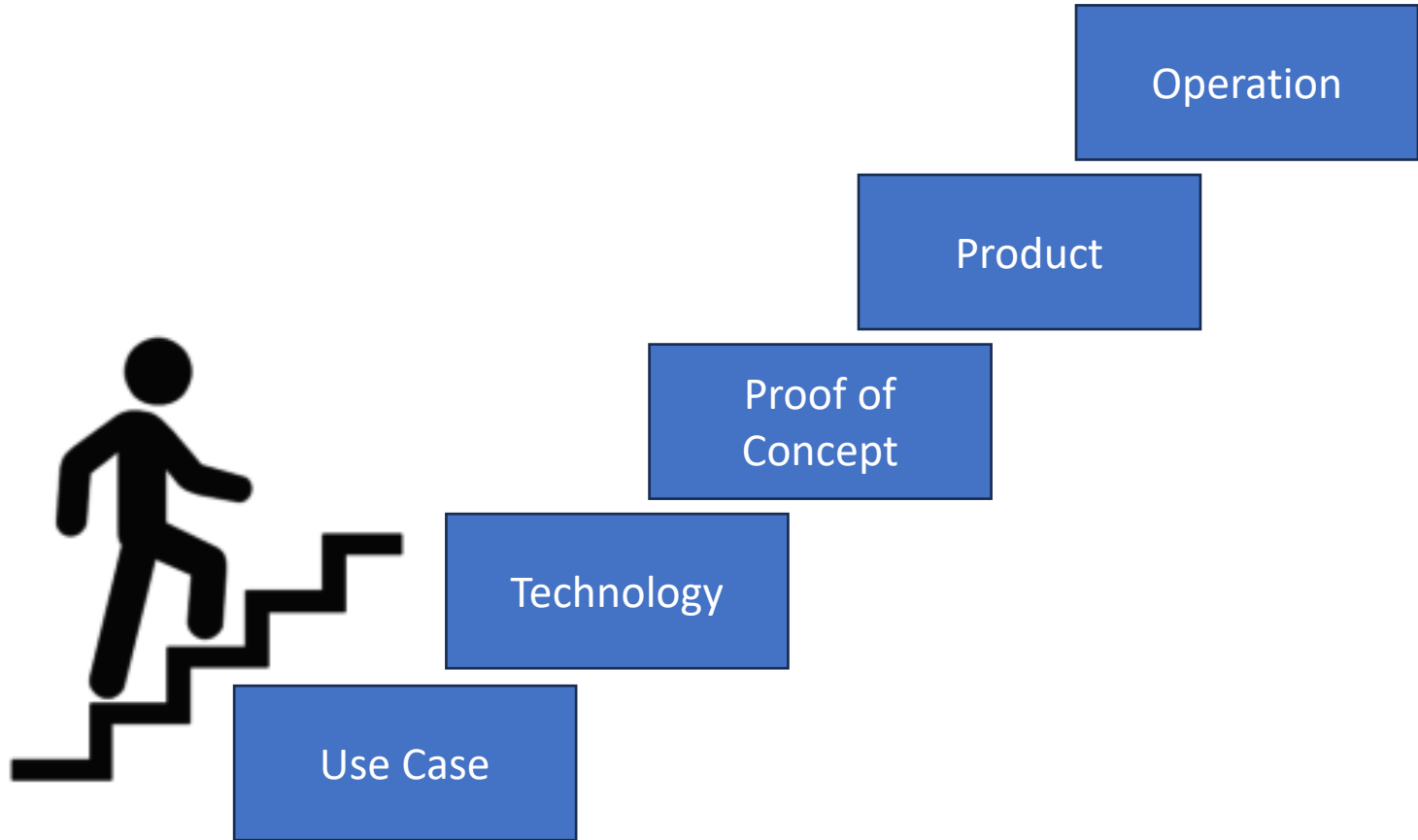
Private 3<sup>rd</sup> Algorithms

Proprietary Data

Proprietary Tools

Proprietary Algorithms

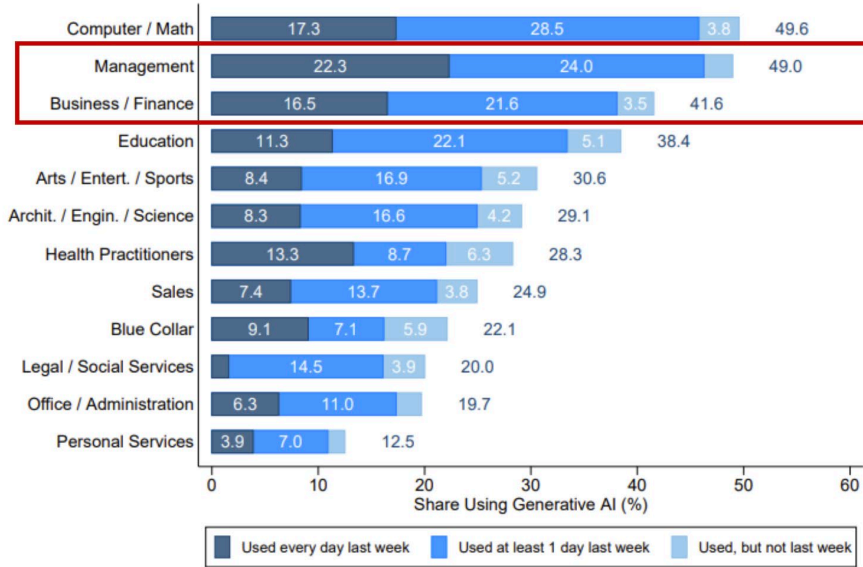
# The AI Journey





# Who is using AI?

(a) Occupation Groups



Data from Bick et al "The Rapid Adoption of Generative AI"  
A representative sample of US workers in August, 2024

(b) Industry Groups

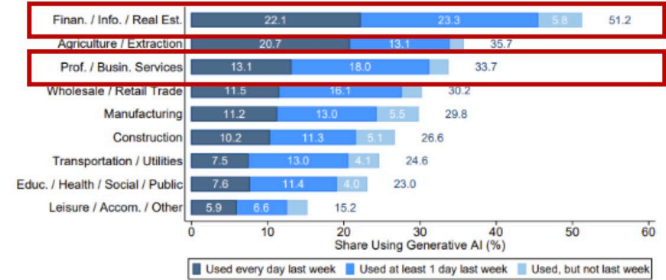
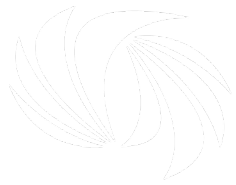


Figure 6: In Which Specific Tasks Is AI Most Useful?

(a) At Work

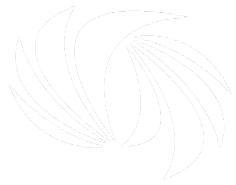




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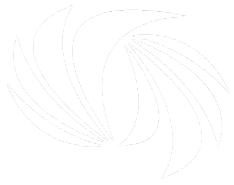
**What are some  
considerations when  
implementing AI in your  
organization?**



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**How can you leverage  
AI to improve  
efficiency?**



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**How can you utilize AI to  
support better decision  
making?**



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# Q & A



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