

YOUR FIRST 30 DAYS WITH AI

Finance Professionals

Five practical actions for FP&A; professionals, financial controllers, finance managers, and accounting teams who want to use AI more confidently -- and more responsibly -- starting this month.

These five actions do not require technical knowledge or special tools. They require professional judgment -- which you already have. Each one takes under 30 minutes. Together they build the foundation for AI use that is confident, consistent, and professionally defensible.

01 Map where AI is already influencing your numbers

AI is embedded in most modern finance platforms -- forecasting engines, variance analysis tools, anomaly detection, automated reporting. The outputs these systems produce often reach decision-makers without any indication that AI was involved in generating them. You cannot apply professional judgment to outputs you do not recognize as AI-generated.

START HERE

Open your three most-used finance platforms this week. Look specifically at any automated analysis, forecast, or flagged anomaly. Ask: was this generated by a human, a rule, or an AI model? Start building the habit of asking that question before acting on any output.

02 Establish your personal verification threshold

Not every AI-generated output in finance carries the same accountability weight. A draft narrative summary is different from a variance figure that will appear in a board pack. Finance professionals who use AI without a clear verification threshold are making implicit risk decisions -- usually the wrong ones.

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Write down this distinction: outputs that inform my thinking versus outputs that carry my professional signature. For the second category, identify the minimum verification step you will take before the output leaves your desk. One rule, written down, applied consistently.

03 Identify what financial data cannot enter unapproved AI tools

Finance professionals handle some of the most sensitive data in any organization -- material non-public information, audit-sensitive materials, client financials, forward-looking projections. Consumer AI tools are not designed to handle this data. Inputting it creates exposure that most finance professionals have not thought through explicitly.

START HERE

Make a short list of data categories you work with regularly. For each, ask: if this data appeared in a model's training set or was retained by a third-party service, what would the consequence be? That thought experiment will tell you quickly what stays out of general-purpose AI tools.

04 Run one AI-assisted analysis and document what you did

The professional skill that matters most in AI-assisted finance work is not using the tool -- it is being able to describe what you did and why you trusted the output. Regulators, auditors, and senior leaders are beginning to ask exactly that question. The professionals who can answer it clearly will be the ones who use AI with confidence.

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Choose one routine analysis task this week and use an AI tool to assist with it. Before you use the output, write two sentences: what the tool did, and what you checked independently. That documentation habit -- started now -- is the foundation of defensible AI-assisted finance work.

05 Have a direct conversation with your manager about AI use standards

Most finance teams are using AI tools without any shared standard for when outputs require verification, what data can be input, or how AI involvement should be disclosed in work product. That silence is a governance gap. One direct conversation with your manager starts to close it -- and positions you as someone thinking seriously about professional standards, not just tool adoption.

START HERE

Ask your manager one specific question this week: do we have a standard for when AI-generated outputs require independent verification before they appear in something we submit or present? Their answer -- or their uncertainty -- tells you exactly where the conversation needs to go next.

QUICK REFERENCE

Five questions. Five signals.

Keep this page. Return to it when you are about to use AI for consequential professional work.

BEFORE YOU USE AI FOR PROFESSIONAL WORK

- Was this output generated by a human, a rule, or an AI model?
- Have I independently verified this before it carries my professional name?
- Does this data meet the standard for input into an approved AI tool?
- Can I describe what this AI tool did if an auditor or regulator asks?
- Would I be comfortable explaining this AI use to my CFO or audit committee?

SIGNALS WORTH PAYING ATTENTION TO

- You cannot identify which outputs in your workflow were AI-generated.
- You have submitted AI-generated analysis without independent verification.
- You have input sensitive financial data into a consumer AI tool.
- Your team has no shared standard for AI output verification.
- You could not explain your AI use clearly to an auditor if asked today.

These five actions are your starting point. AI Wise for Finance Professionals takes you significantly further -- covering the governance frameworks, regulatory obligations under SOX, SEC, FINRA, and AICPA standards, data classification requirements, and verification standards that make AI-assisted finance work defensible when it matters. Nine modules. Role-specific. Built for how AI actually shows up in financial work.

Ready to go further?

Enroll in AI Wise for Finance Professionals and earn a verifiable credential that documents your AI literacy at a professional level.

aiwise.training/product/ai-wise-for-finance-professionals/