



A PRACTICAL PLAYBOOK OF 10 AI WORKFLOWS FOR
BANKING & FINANCE

Claude AI for Financial Services

Move from pilots to everyday AI-powered
work, with your people in control.

- ✓ 10 practical workflows
- ✓ Business use examples
- ✓ Clear approval points
- ✓ Proven framework for production readiness

FOR LEADERS IN

Banking

Investment Management

Lending

Wealth Management

FinTech & more

10

AI workflows
for banking
& finance

By Wildnet Edge

Claude Select Services Partner

www.wildnetedge.com

Start with Work that is Slowing Your People Down

A credit analyst needs complete files. An advisor needs time to prepare for a client. A service agent needs the right policy. These can be a useful starting point for Claude AI for Financial Services.



Claude can help teams with

- Reading documents,
- Bringing information together &
- Preparing work for review.



And business value can be built from it by ensuring

- Who checks the output?
- Which systems does it reach?
- Does the process improve?

At Wildnet Edge, we recommend that clients start with a repeatable task, a measurable goal & a clear owner. Using Claude for banking will reduce the file prep time while maintaining quality.

We bring you 10 in-demand workflows you can implement with Claude AI for finance. Each includes a practical process, control method, relevant measurement & published business example.

A Claude implementation partner like us can help you with reliable data & accountable people.

“

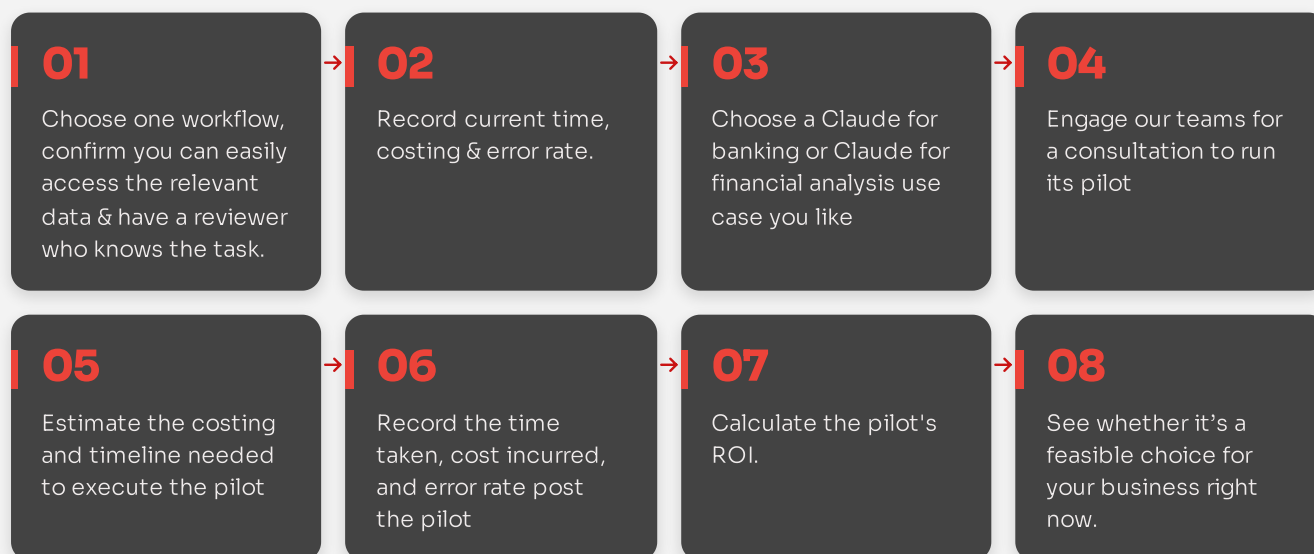
*Start small enough to test.
Build carefully enough to trust.*

Your Guide to Ten Practical Workflows

Use our Claude AI for financial services eBook to identify a task worth testing, then add the right controls to see it through to a successful rollout.

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How to Use this Playbook?



Prepare Stronger Customer & Credit Files

Claude AI for financial services can organize evidence before specialists make decisions.

01 KYC File Preparation

WORKFLOW

- Feed approved identity records, screening results & ownership documents into a controlled workspace.
- Claude will list missing items, prepare exceptions & link evidence for the KYC (Know Your Customer) reviewer.

CONTROL

- Keep identity checks & sanctions screening in approved systems.
- A compliance officer will decide whether you should proceed further.

MEASURE

Prep time & missed exceptions

RELATED EXAMPLE

LSEG

LSEG uses Claude for World-Check content curation to

- Reduce review work by **65%** and
- Free up researchers' time by **33%**.

02 Credit Memo Preparation

WORKFLOW

- Combine borrower statements, lending policy & verified ratios.
- Claude drafts a memo covering repayment risks, cash flows & missing evidence.

CONTROL

- Check calculations in approved tools only.
- Let a credit officer own the decision.

MEASURE

Drafting time & reviewer corrections

RELATED EXAMPLE

AIG

AIG informed that they achieved

- **5X** quicker business reviews,
- With accuracy rising from **75% to 90%** with Claude solutions.

Give Analysts More Time to Investigate

Use Claude AI for financial services to prepare questions and evidence for expert reviews.

03 Financial Analysis

WORKFLOW

- Provide financial statements, approved market data & prior results.
- Claude for financial analysis summarizes the changes in cash flow, revenue & margins with links to support the findings.

CONTROL

Verify units, dates & calculations before finalizing the conclusions.

MEASURE

Time to review an analysis & correction rate

RELATED EXAMPLE

Bridgewater

Bridgewater stated that Claude has helped them with the early versions of

- Investment Analysts Assistant,
- Work streamlining via Python code,
- Iterative financial analysis &
- Visualizations.

04 Investment Due Diligence

WORKFLOW

- Give Claude AI automation in financial services access to the approved deal documents.
- Request a summary of conflicting stats, business risks & unanswered queries, with a source for each finding.

CONTROL

Analysts investigate gaps & approve the investment memo.

MEASURE

Preparation time & material issues missed

RELATED EXAMPLE

Hg (Hg Capital)

Hg (Hg Capital) shared that Claude for Excel is helping its teams automate complex analysis of unstructured data for due diligence & financial modeling, saving investment resources' time.

Help Teams Find the Right Response

When source material is current, you can use Claude AI for financial services to empower research & customer operations.

05 Regulatory Research

WORKFLOW

- Provide current internal policies & official notices.
- Claude will draft a comparison showing possible obligations, source passages, affected processes & compliance questions.

CONTROL

- Clearly mention jurisdiction & effective date.
- Legal and/or compliance staff will confirm applicability & interpretation.

MEASURE

Research time & reviewer-confirmed omissions

RELATED EXAMPLE

NBIM

NBIM uses Claude to process its regulatory filings efficiently & automate the compliance documentation. They witnessed

- 20% time saving/week/employee (on analytical & ops tasks), and
- **600+** active Claude users.

06 Customer Service Support

WORKFLOW

- Combine an authenticated customer's query with permitted account context & approved procedures.
- Claude drafts a response or completes a handoff to a specialist.

CONTROL

Verify & escalate complaints, requests that need regulated advice, and vulnerable customer cases.

MEASURE

Resolution quality, escalation accuracy & repeat contacts

RELATED EXAMPLE

Gradient Labs

Gradient Labs used a Claude-powered customer service support platform and witnessed

- 80-90% query resolution (automated support) &
- **98%** customer satisfaction.

Turn Scattered Information into Useful Preparation

With Claude AI for financial services, employees can access the information they are authorized to see.

07 Internal Knowledge Support

WORKFLOW

- Connect research libraries & approved procedures.
- Claude will answer staff questions along with document dates, source links & a clear statement (when no evidence).

CONTROL

Preserve every user's access rights while excluding outdated information.

MEASURE

Search time, unanswered questions & source accuracy

RELATED EXAMPLE

Block

Block, which powers Square & Cash App, uses Claude with its internal agent, goose, to help employees answer questions quickly and save **8 to 10+ hours** weekly.

08 Client Meeting Preparation

WORKFLOW

- Interconnect permitted CRM notes with recent company developments & account information.
- Claude for Financial Advisors will create a brief covering previous commitments, open queries & discussion topics.

CONTROL

The RM (relationship manager) checks the suitability & facts before using the brief.

MEASURE

Missing or wrong details & preparation time

RELATED EXAMPLE

Mizuho

Mizuho used Claude for faster meeting prep and richer client insights, giving bankers more time to develop ideas before conversations.

Prepare Outputs That People Can Check

Claude AI for financial services can help teams draft better reports & examine models before release. Claude AI for finance can support the review process.

09 Client Reporting

WORKFLOW

- Use approved portfolio figures, reporting template & commentary.
- Claude for Financial Advisors will prepare a client-focused draft with links for supporting data.

CONTROL

An authorized reviewer checks disclosures, performance numbers & suitability before sharing the report.

MEASURE

Total prep & approval time (include rework)

RELATED EXAMPLE

YCharts

YCharts uses Claude to power its AI agent, Y, to create better portfolio comparison reports & client commentary.

10 Financial Model Review

WORKFLOW

- Provide a review checklist & approved workbook.
- Claude will flag inconsistent assumptions, formulas & unexpected changes that need further investigation.

CONTROL

Recalculate in a previously approved software and allow an analyst to check the findings.

MEASURE

False alarms, review time & confirmed issues found

RELATED EXAMPLE

Crunched

Crunched uses Claude to check its Excel models for flawed assumptions, broken links & financial logic errors, and then rectifies them promptly. It has helped them with

- More than **50%** time savings in finance modeling and
- Core workflow time reduced to **1 hr from 10 hrs.**

Why do promising AI pilots stall?

95%

of AI pilots failed to deliver meaningful impact

According to the MIT 2025 report, 95% of AI pilots failed to deliver meaningful impact. And the March 2026 FIFAI II report by Canadian OSFI states that AI pilots are failing because of

Disconnected systems

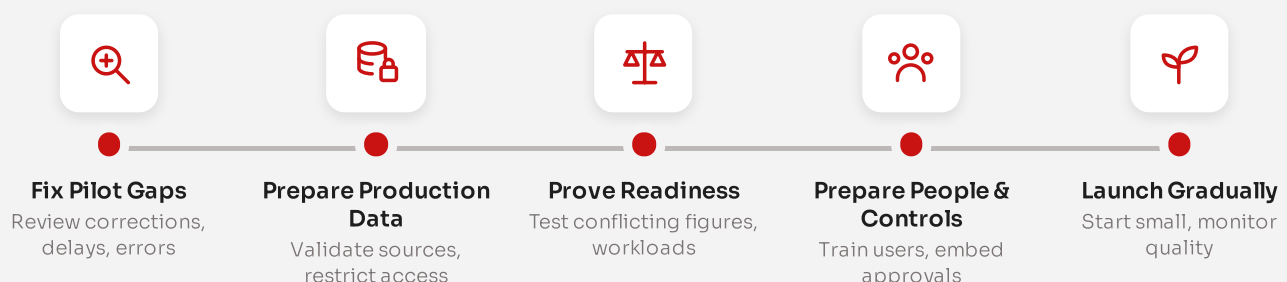
Rushed strategies

Unrealistic expectations

Poor data quality

...all of which are implementation risks that can prove dangerous.

For a successful Claude AI implementation in financial services, follow these 5 practical steps.



Moving Claude Pilots to Production / 5-step Approach

STEP

1

Fix the pilot's gaps

Review corrections, delays & errors. Choose a valuable workflow, set the quality, cost & time goals, and assign an owner.

STEP

2

Prepare production data

Validate sources, restrict access & connect required systems. Define permitted usage & retention.

STEP

3

Prove readiness

Test conflicting figures, realistic workloads & missing documents. Check citations, calculations & escalation behavior vs release criteria.

STEP

4

Prepare people & controls

Train users, embed approvals & assign reviewers for high-impact decisions. Record actions & ensure incident responsibility.

STEP

5

Launch gradually & keep improving

- Start small,
- Monitor quality, total costs & review effort, and
- Maintain rollback options while retesting the changes & expanding when they hold.

/// About Wildnet Edge

Build Your Next Financial Workflow with Wildnet Edge

Wildnet Edge empowers enterprises across the USA, Canada, and Europe to carve out previously invisible profit margins through our AI development & enterprise integration services. Through our leading partnerships with Claude (Select Services Partnership), Salesforce, OpenAI, AWS, Azure, Google Cloud, and more, we deliver AI capabilities fully integrated with the processes & systems where business work happens.

Services We Offer


AI Transformation


Product Engineering


Cloud & Managed Ops


Salesforce Solutions


Cybersecurity

For Claude AI for financial services, let's begin with a process your team desperately wants to improve.

Bring us

Current steps, approval requirements, source systems & the results to be measured.

Let's define

A focused Claude-powered workflow, the controls it must follow, the data it needs & the evidence needed to convert it into a production solution.

Result

You must be able to save time & costs while keeping risk within limits.

Ready to choose your first workflow?

Or email us at sales@wildnetedge.com to discuss moving from Pilot to Production with our Claude implementation consultants.

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Whatever your business needs, Wildnet Edge is here as a certified Claude service partner.



Claude AI for Financial Services

www.wildnetedge.com