

10+ AI Agent Use Cases for Finance

Field-tested agent patterns, from the team that ships them into production.

01 Statement reconciliation

Match transactions across entities and flag breaks with explanations.

02 Investment memo drafting

Turn research packs and filings into sourced first-draft memos.

03 KPI extraction

Pull revenue, margin, and cash-flow metrics from filings into your models.

04 Variance commentary

Draft month-over-month variance explanations for review.

05 Close checklist automation

Track close tasks and chase owners automatically.

06 Invoice matching

Three-way match AP invoices and surface exceptions only.

07 Expense policy checks

Screen expense reports against policy before approval.

08 Board pack assembly

Compile recurring reporting into a consistent board-ready pack.

09 Covenant monitoring

Track loan covenants against actuals and alert on headroom.

10 Research summarization

Digest broker research into daily briefs for the team.
