



## NEUGROUP AI TRANSFORMATION IN FINANCE INAUGURAL POP-UP EVENT MEETING AGENDA

Day One: Thursday, October 1, 2026 (All times reflect Pacific Time)

12:00 – 12:30pm

### Member Arrival and Networking Lunch

*Anthropic, 500 Howard St., San Francisco, CA 94105*

12:30 – 1:00pm

### Welcome Remarks, What's Ready Now and What's Next

*We will begin the session with welcome remarks from Joseph Neu before passing to Anthropic Treasurer Allison Rossi for an update on where capabilities are advancing and what remains overhyped or impractical.*

#### *Session leaders:*

- Joseph Neu, NeuGroup
- Allison Rossi, Anthropic

1:00 – 2:30pm

### AI Workbench Showcase: Projects, Priorities and Live Use-Case Review

*Anthropic will kick off this member showcase by sharing their current dashboards and automated workflows. Member companies will be encouraged to present their current AI use cases to be added to the NeuGroup AI Workbench. Anthropic representatives serve as expert reviewers, offering practical critiques, identifying opportunities to extend each application and demonstrating how emerging capabilities could improve the solution.*

#### *Session leaders:*

- Joshua Man, Anthropic
- Danjie Yin, Anthropic

2:30 – 2:45pm

### Networking Break

2:45 – 3:45pm

### Concurrent Breakout Sessions

*Participants select one of three working sessions:*

#### From Small Wins to Needle-Movers: Scaling AI in Finance

*A peer discussion on moving from discrete AI experiments to enterprise-scale implementations—including cash forecasting, FX analysis, covenant tracking and bank-portal automation—with a focus on measuring ROI, securing governance support and sustaining adoption.*

#### The Data Problem: AI as a Data Strategy Accelerator

*Members discuss how finance teams are using AI to address the data-readiness problem itself, including cleansing, reconciliation and normalization. Participants will examine the data foundations, ownership models and governance structures required to scale these applications responsibly.*

#### AI Governance, Risk and Cost Controls in Finance

*A practical look at internal governance structures. Members will discuss practical governance models for setting agent permissions, approval thresholds and escalation protocols while maintaining human oversight. Topics include decision rights, segregation of duties, audit trails, third-party and data risk, exception handling, financial exposure and controls for monitoring agent actions and costs.*

3:45 – 4:00pm

### Break

4:00 – 4:45pm

### Solve My Problem

*Members bring forward a real-world challenge or blocker from an active AI initiative. Anthropic experts provide live troubleshooting, practical recommendations and ideas to strengthen or extend the use case.*

4:45 – 5:00pm

### Use-Case Scoring and Key Takeaways

*Participants and Anthropic hosts will grade the member-shared use cases, identifying those with the greatest potential for measurable impact. NeuGroup closes the summit by highlighting recurring lessons, priority opportunities and potential follow-up collaborations or execution sprints.*



5:00 – 5:15pm

Walk to Reception Venue

5:15 – 7:00pm

Networking Reception

*Modi, 88 Natoma St., San Francisco, CA 94105*

*All NeuGroup meetings and engagements are conducted under the Chatham House Rule. By participating in the event, you agree to adhere to this standard. As a reminder, there should be no discussions or collusion with your competitors of agreements or concerted actions that may restrain competition. This includes the improper exchange of information concerning company specific current or future prices, price levels, pricing formulas, credit terms, discounts, costs, terms, or other features that can impact prices.*