NEUGROUP AI TRANSFORMATION IN FINANCE
OPENAI POP-UP AGENDA

Wednesday, December 9, 2026 (All times reflect Pacific Time)

1:00pm — Member Arrival

OpenAI, 1960 Bryant Street, San Francisco, CA 94110

1:00 – 1:30pm — Welcome Remarks

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

Session leaders:

- *Joseph Neu, NeuGroup*
- *Tahreem Kampton, OpenAI*

1:30 – 2:00pm — OpenAI's Journey and NeuGroup AI Workbench

OpenAI finance leaders will share how AI is being used within their own functions, beginning with Treasury, including the use of agents, followed by Tax and Strategic Finance. Each segment is intended to cover where AI is applied in day-to-day work and what the team has learned so far. Members are encouraged to bring their own use cases to share, adding to NeuGroup's AI Workbench database.

2:00 – 2:45pm — Bank Connectivity

A panel discussion on bank connectivity challenges in automation and AI implementation.

2:45 – 3:00pm — Networking Break

Take some time to exchange ideas, compare approaches, and continue conversations that can help move your priorities forward.

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3:00 – 3:45pm	**TMS Strategy** *A panel discussion on treasury management system (TMS) strategy and what is being built vs. bought.*
3:45 – 4:15pm	**Go-to-Market: The Future of AI and Token Costs** *OpenAI go-to-market representatives will discuss the future direction of AI and token costs, including what each may mean for how finance teams plan their AI usage.*
4:15 – 5:00pm	**Forward Deployed Engineering (FDE) and Solve My Problem** *An OpenAI forward deployed engineer (FDE), who works directly with customers to implement AI solutions, will join the group and explains how this model works in practice. Members will have the opportunity to share their current blockers or challenges in AI implementations for review by the FDE.*
5:00 – 5:30pm	**The AI Impact on Staffing** *To close the day, we will discuss staffing as AI adoption grows in finance, including how roles, skills and team structures may be changing and what members may want to consider.*
5:30 – 5:45pm	**Closing Remarks** *We'll wrap up the meeting by summarizing key takeaways and outlining opportunities to stay connected and continue the conversation between meetings.*
5:45 – 7:30pm	**Happy Hour** ***Venue to be confirmed***

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