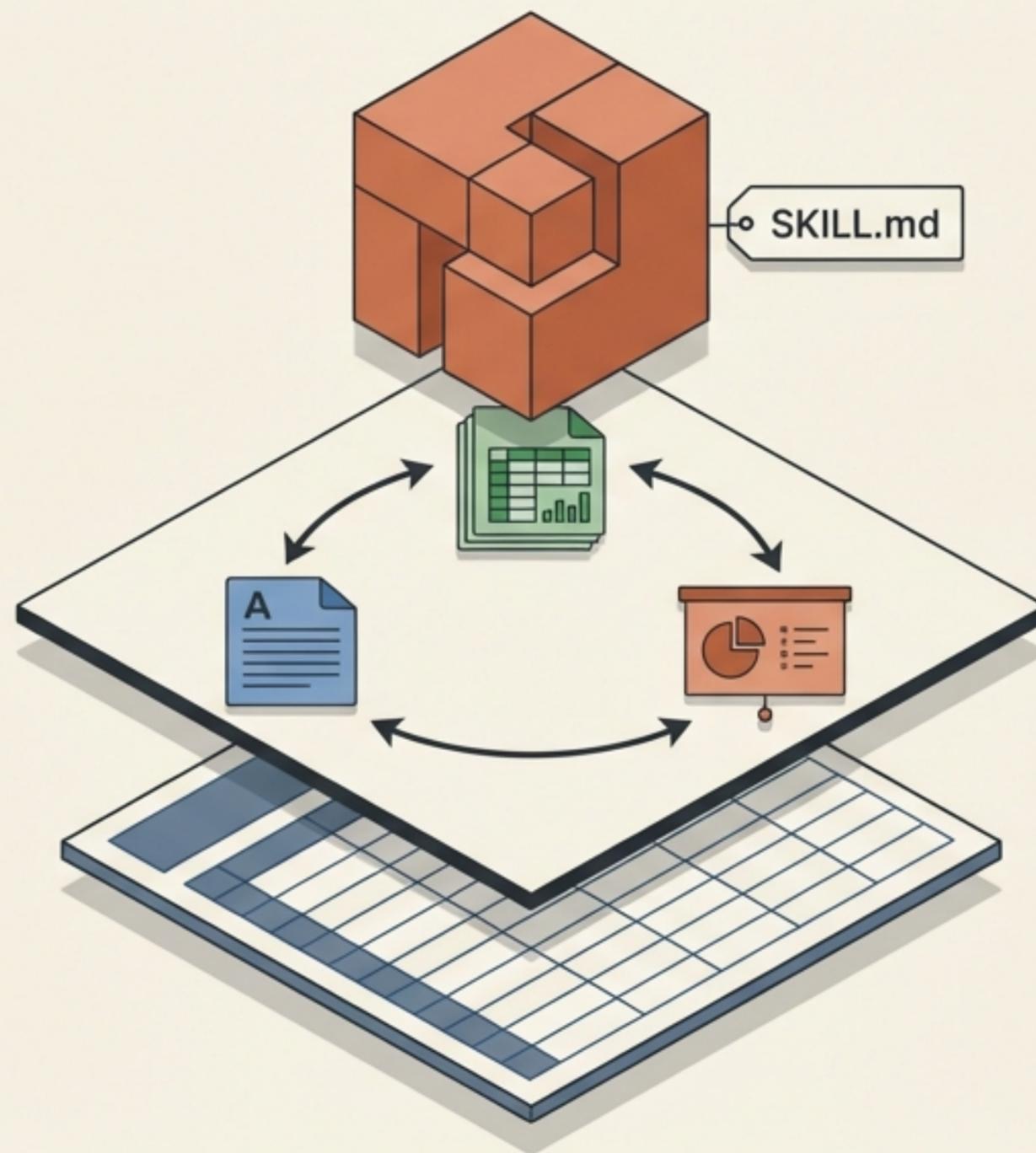


Deploying the Finance Domain Agent Architecture From Embedded Assistant to Enterprise Orchestrator



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drvræ set a 2.5D technological
2.5D stack-tech architectural
Finance Eroœans.

In Inter regular, the mamic
orchestration loop, in the firm's
encoded institutional knowledge.

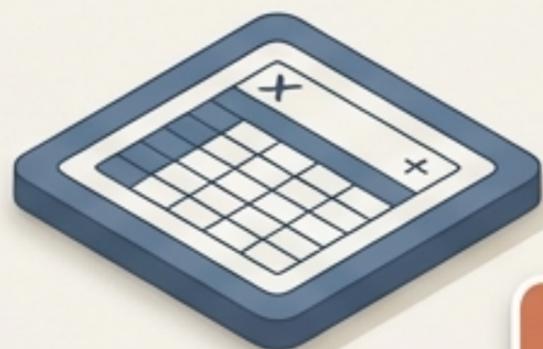
Scope defines the architecture, not infrastructure

Claude in Excel

Embedded Assistant

Scope: 1 Workbook

Role: A deep modeling companion

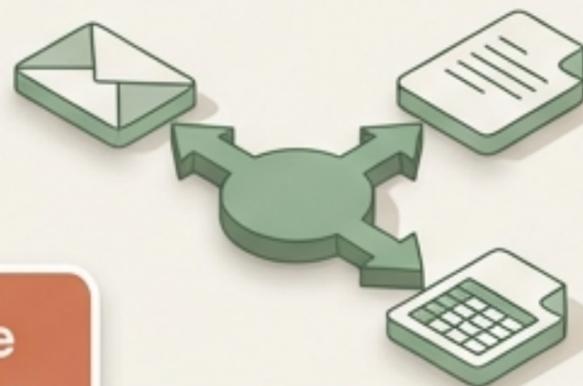


Cowork with Excel

Orchestrating Agent

Scope: Multi-App

Role: Automated workflow execution across tools



Both environments use the exact same connectors. The difference is entirely in scope.

Shared Data Connector Ecosystem

FactSet, PitchBook, S&P Global

Claude in Excel acts as a deep modeling companion

	A	B	C	D	E	F
1	Year	Revenue	Costs	Profit	Growth Rate	Projected Cost
2	2023	\$5,000,000	\$2,000,000	\$3,000,000	15%	
3	2024	\$5,750,000	\$2,300,000	\$3,450,000	12%	
4	2025	\$6,440,000	\$2,576,000	\$3,864,000	10%	
5				\$3,864,000		#VALUE!
7						
8						
9						
10						
11						

Cell-Level Citations

Maps logic from outputs back to specific input cells for verifiable dependency tracing.

Non-Destructive Scenarios

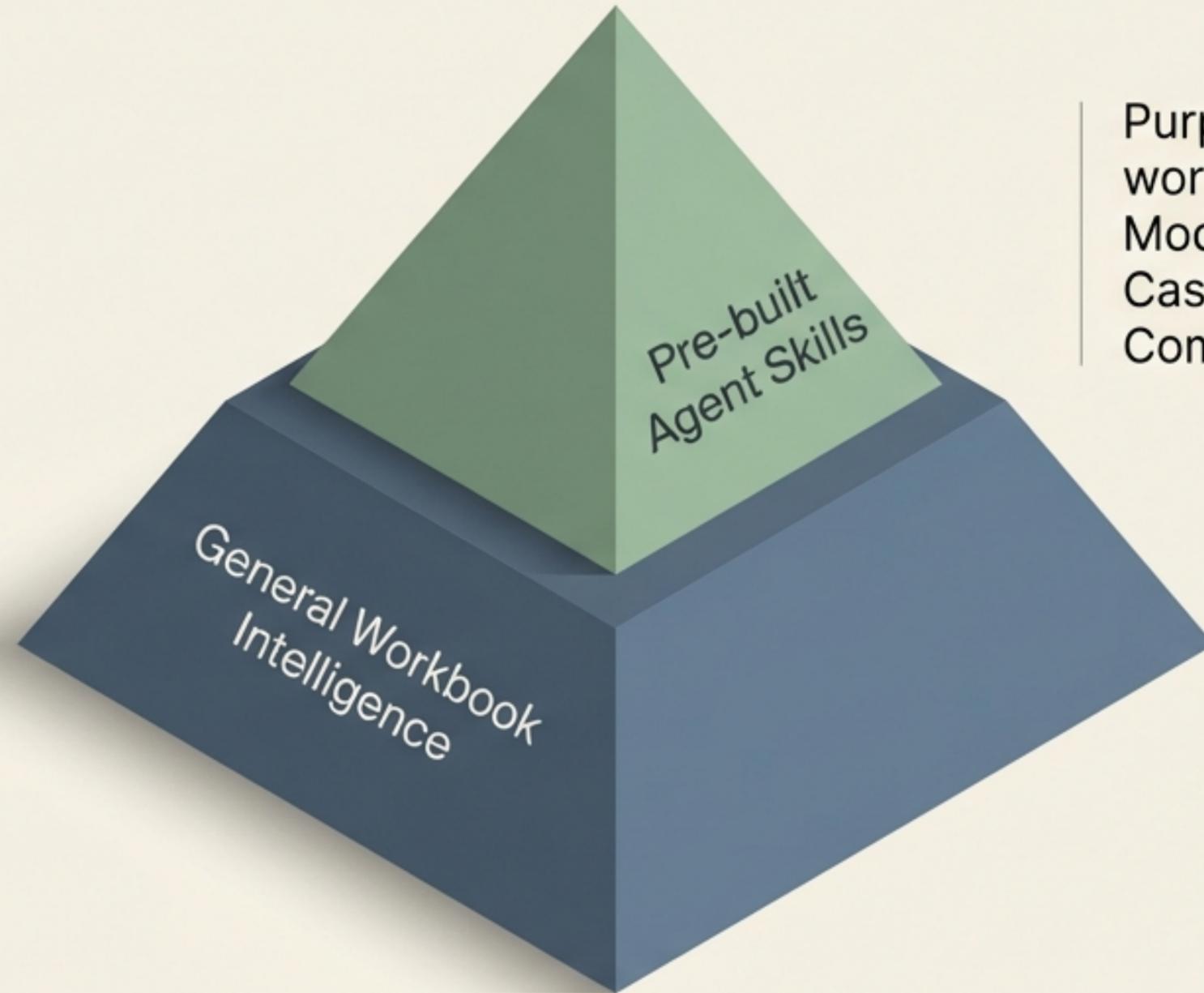
Test multi-variable scenarios safely without destroying base cases via Ctrl+Z revert.

Invisible Error Diagnosis

Diagnoses hidden text-number mismatches imported from accounting systems.

Two distinct intelligence layers operate inside the workbook

Requires no configuration. Reads all sheets, maps formula dependencies, and debugs errors.



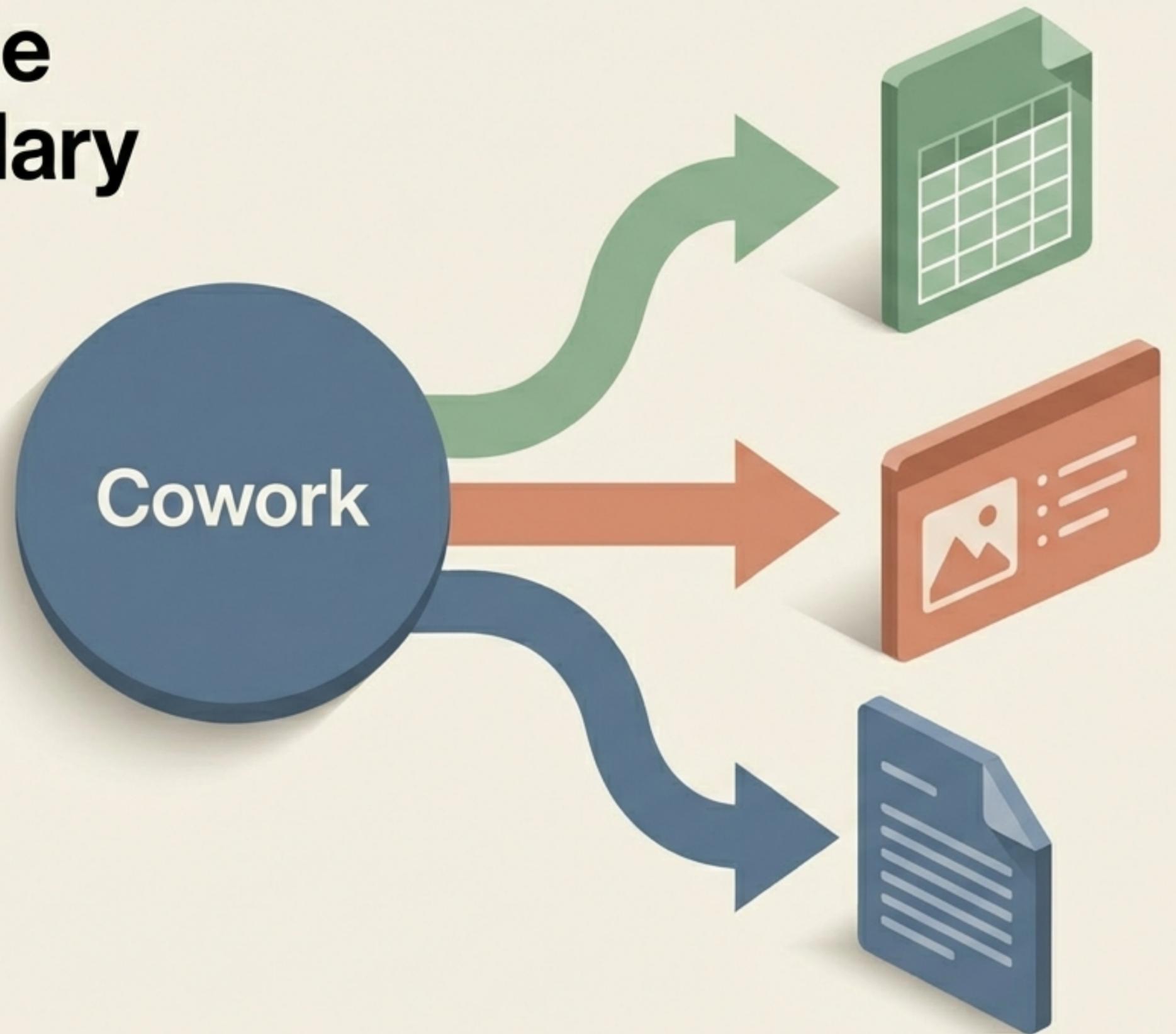
Purpose-built financial workflows: 3-Statement Modeling, Discounted Cash Flow (DCF), and Comparable Company Analysis.

Cowork breaks the application boundary

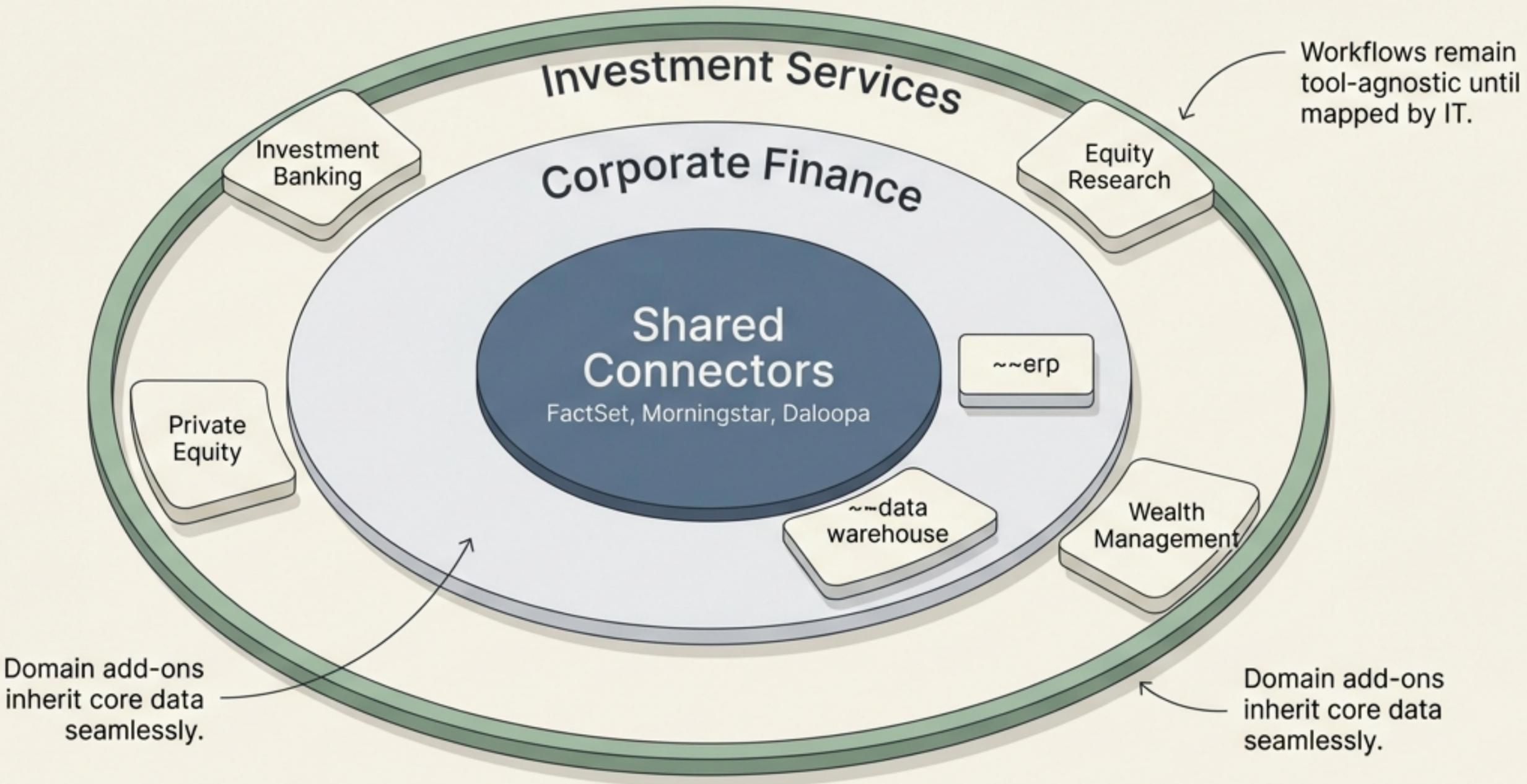
From passive help
to active execution.

Neue Haas Grotesk Display Medium

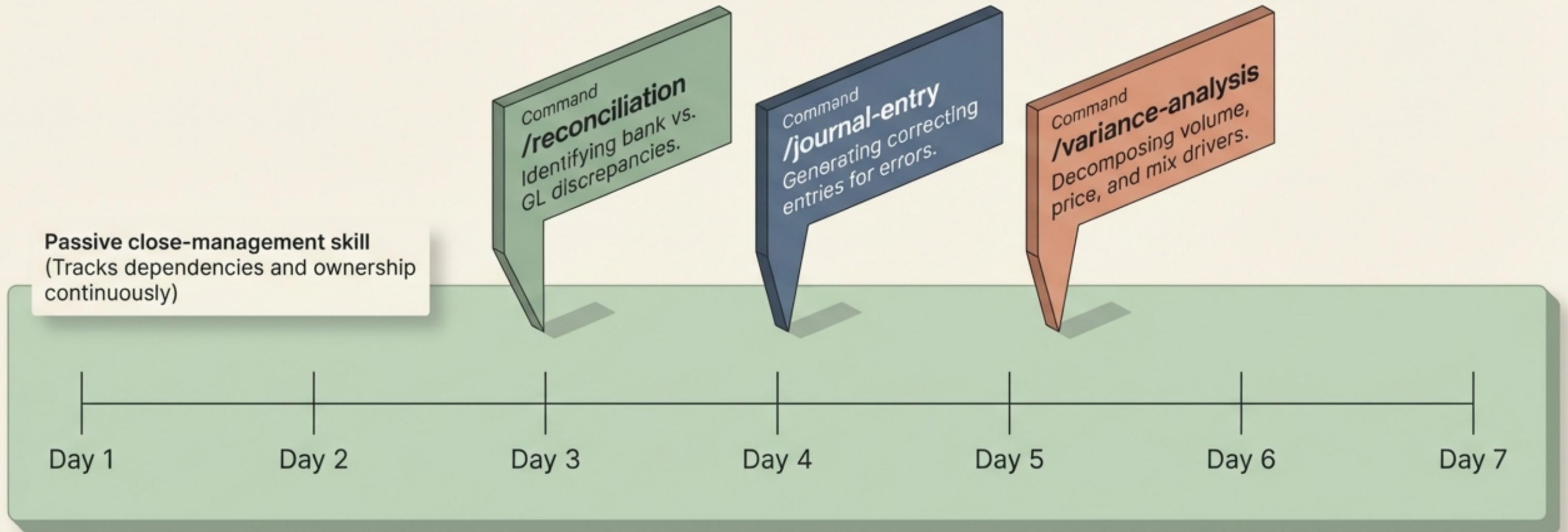
The agent carries context forward autonomously, treating the spreadsheet as just one node in a multi-step production workflow.



Configure data connectors once, inherit onsite everywhere

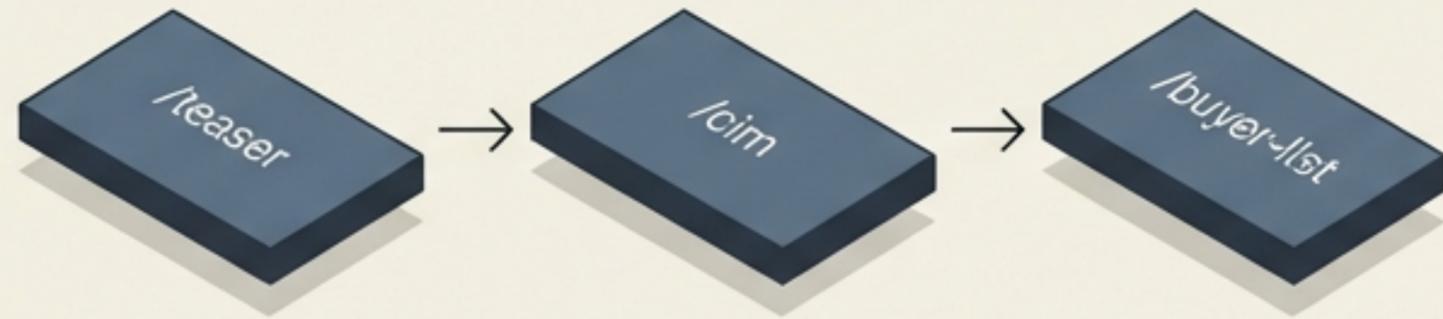


Orchestrating the multi-day month-end close

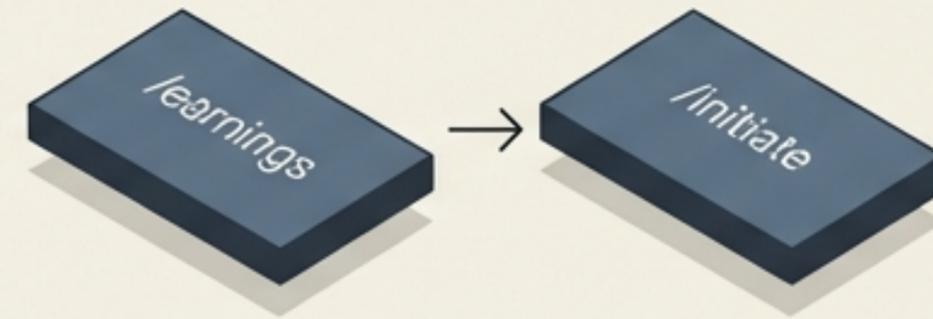


Tailoring workflows from deal origination to portfolio management.

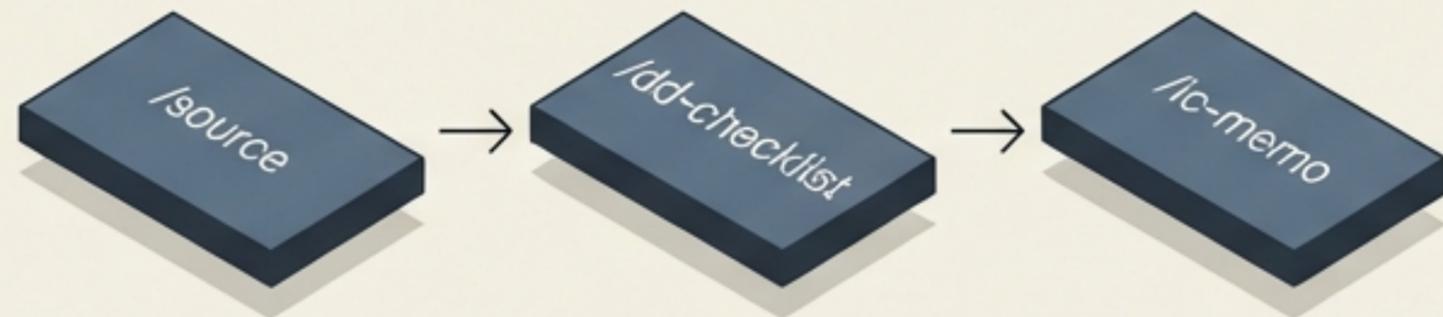
Investment Banking



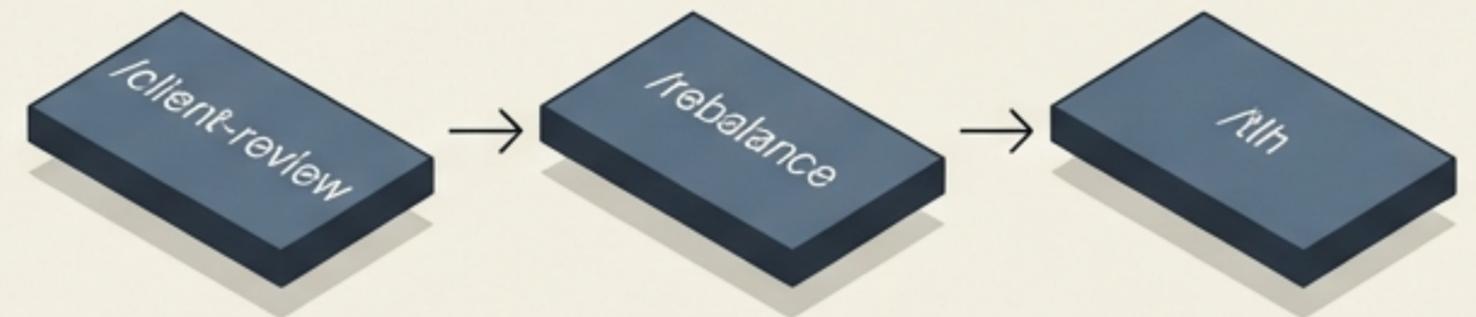
Equity Research



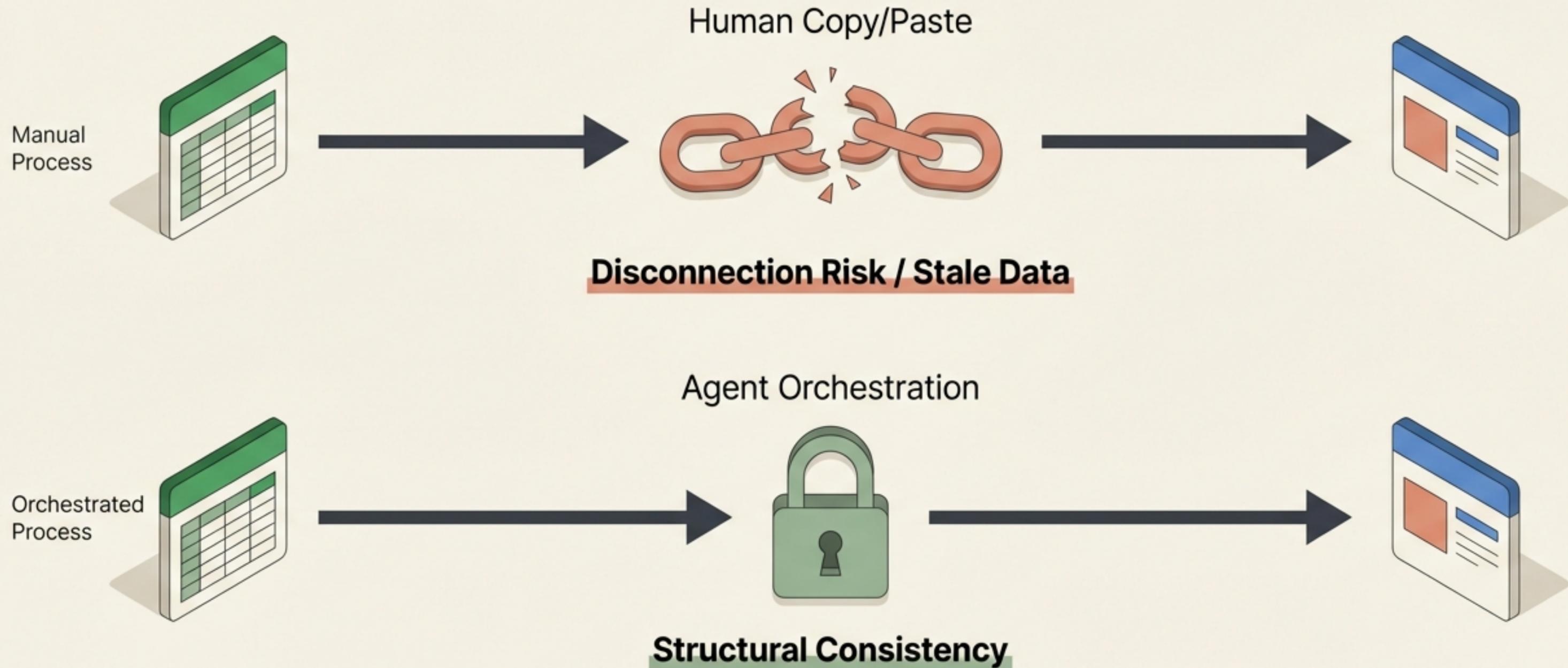
Private Equity



Wealth Management



Single-pass production eliminates disconnection risk



Generic AI calculates the math, extensions encode your business

Generic AI

Flags a \$50K revenue variance because it mathematically exceeds a 10% threshold.

**Which variances
actually matter to
your CFO?**

Enterprise AI

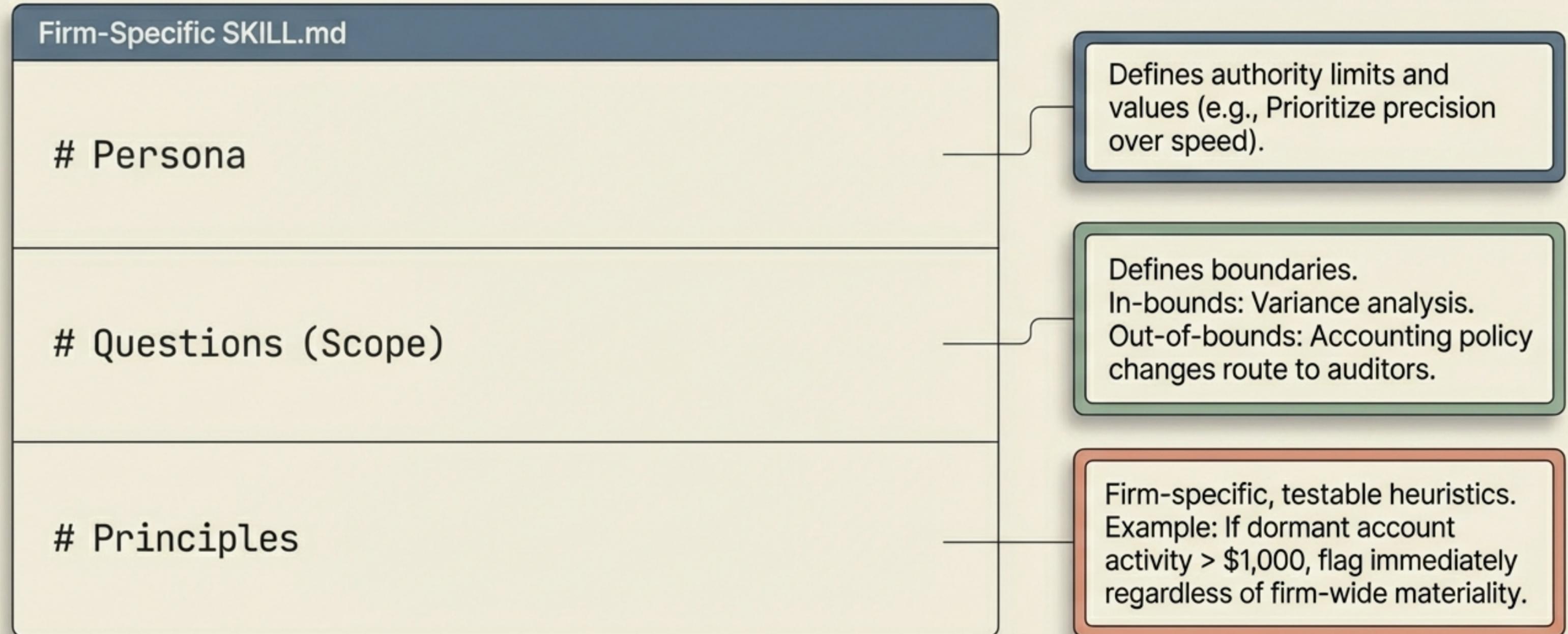
Ignores the \$50K revenue variance as expected seasonal noise, but aggressively flags a \$5K anomaly in a dormant account as a critical fraud signal.

Surfacing tacit financial knowledge requires structured extraction

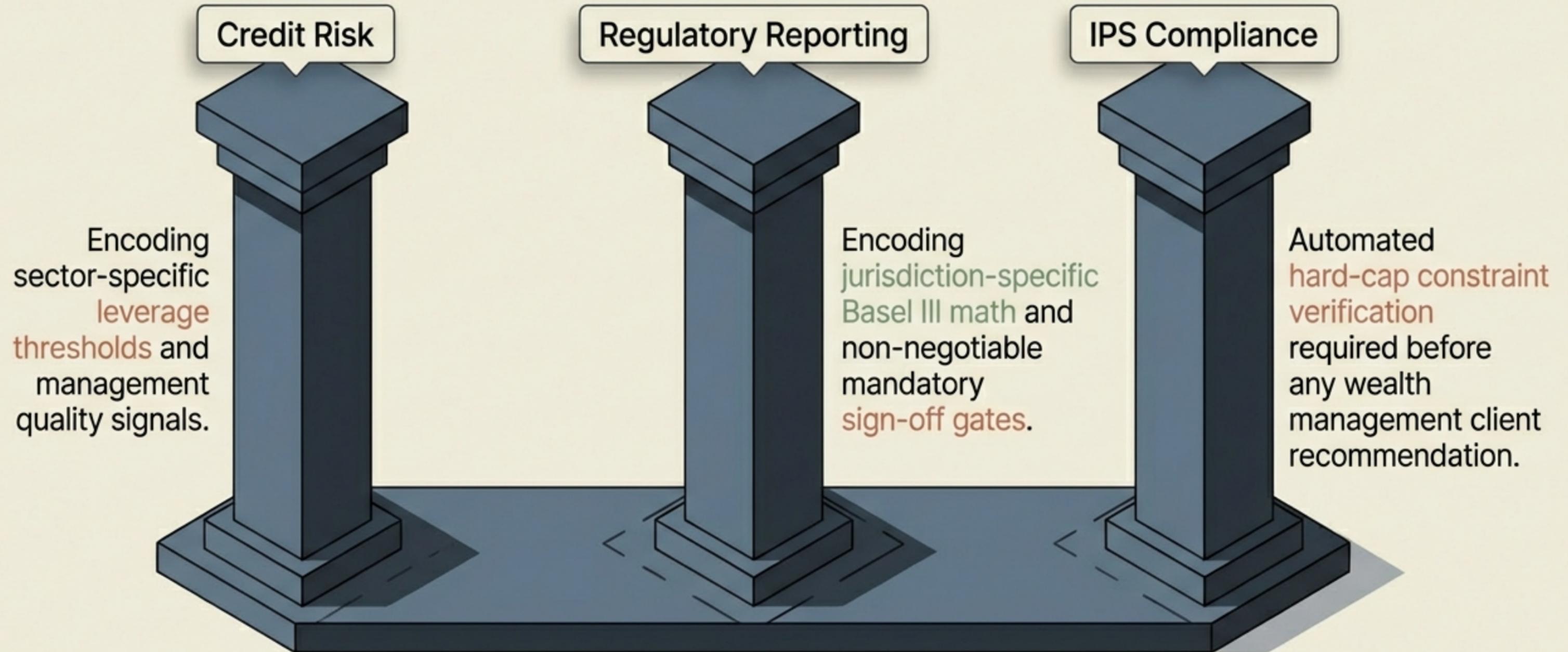


Distill expert interviews into actionable code using the Five Questions framework.

Encoding extracted knowledge into functional code



High-stakes extensions demand jurisdictional and institutional precision



Extending agent workflows deep into operational finance

Enforcing FX hedging policies (e.g., verifying 75% minimum hedge ratios).

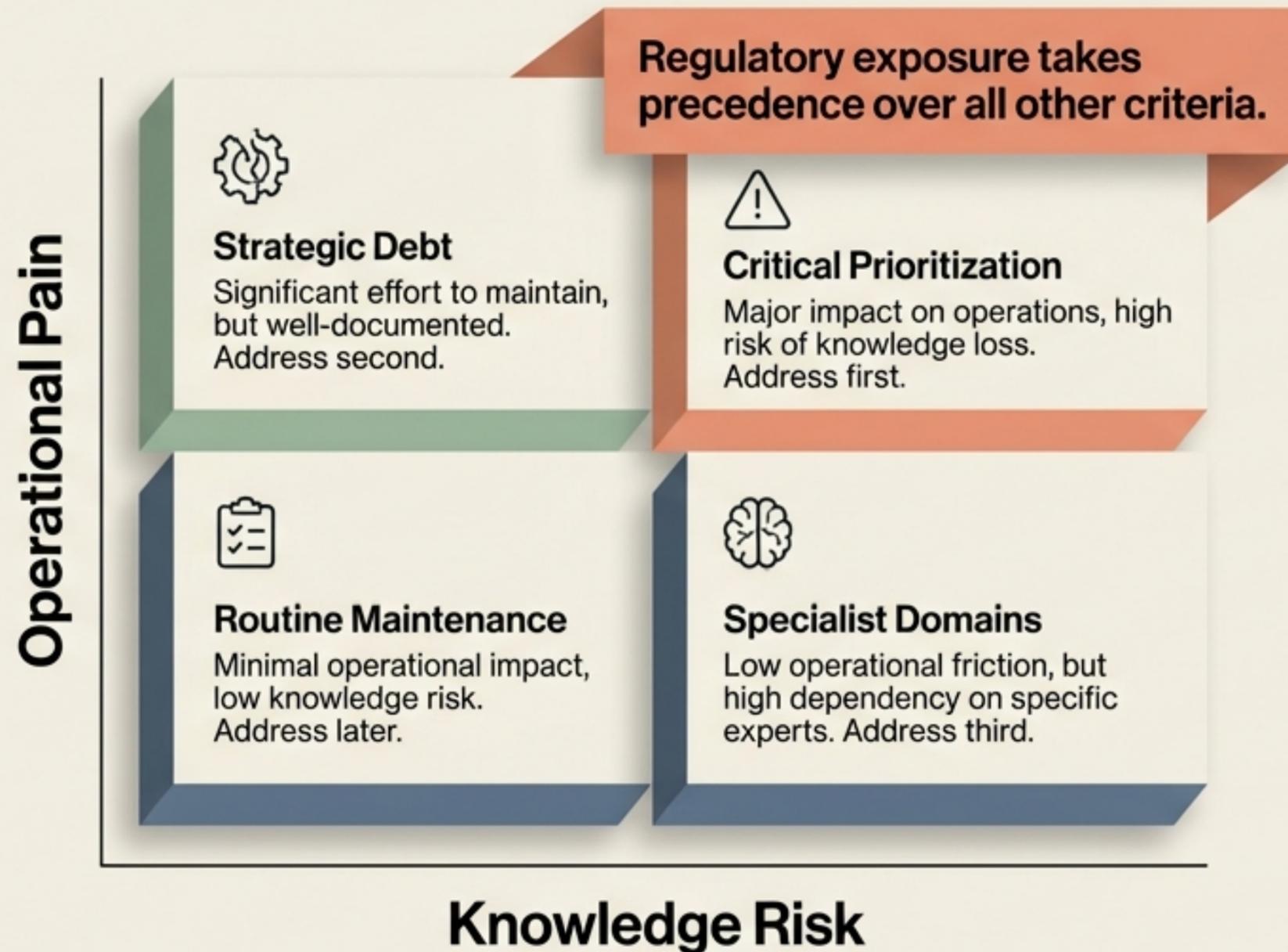


Enforcing CFO-preferred bridge formats (driver-based volume/price/mix decomposition).



Tracking Day-1 readiness checklists and synergy realization tracking.

Prioritize Q1 deployments by balancing operational pain and knowledge risk



Run 3 extensions in parallel for Quarter 1:

1. Highest Volume Workflow
2. Highest Risk Compliance Area
3. Most At-Risk Institutional Knowledge