

Claude for the financial industry

A practical deployment guide



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Foreword

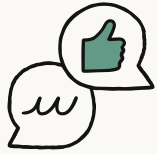
AI is rapidly transforming financial services. As executives face pressures on margins, talent, and regulation, they are embracing AI technology for faster, better answers.

A **2026 NVIDIA survey** found that 61% of financial services firms are using or assessing generative AI, with 89% reporting that AI has increased revenue while lowering costs. Across trading, underwriting, lending, and advising, the industry has historically been fast to adopt any technology that offers an edge in research and productivity. Today, that's agentic AI: systems that act on the work, not just answer questions about it. The NVIDIA survey found that 42% of firms are using or assessing agentic AI, with more than half of them (56%) citing knowledge management and retrieval as their top overall use cases for AI agents.

At Anthropic, we are seeing this in action. Claude has changed how teams get answers and Claude Code has transformed how engineers build software. Claude Cowork has brought that same execution power to analysts and operators whose work revolves around documents and data.

Financial services organizations are using Claude for research, deal work, analysis, claims, model reviews, reporting, and more. Most firms run more than one Claude product: Claude for chat and research, Claude Cowork for project-level work across files and apps, Claude Code for quantitative and engineering teams, Claude for Microsoft 365 for the hours spent in Excel, PowerPoint, and Word, and the Claude Platform and Claude Managed Agents for building and deploying custom applications on Claude.

This guide walks through each product, offers customer examples from across the industry, and tips on how to roll out Claude inside your firm.



Pillar 01: Chat

Every knowledge worker

The on-ramp. Conversational access for drafting, research, analysis, and Q&A — in the browser and embedded in Microsoft 365.

- Policy and memo drafting
- Research synthesis
- Email and client comms



Pillar 02: Cowork

Business operators and analysts

Multi-step work done for you. Claude operates across the tools your people already use — inbox, files, CRM, internal systems — with humans in the loop.

- Deal room prep
- KYC and onboarding
- Portfolio and ops reviews

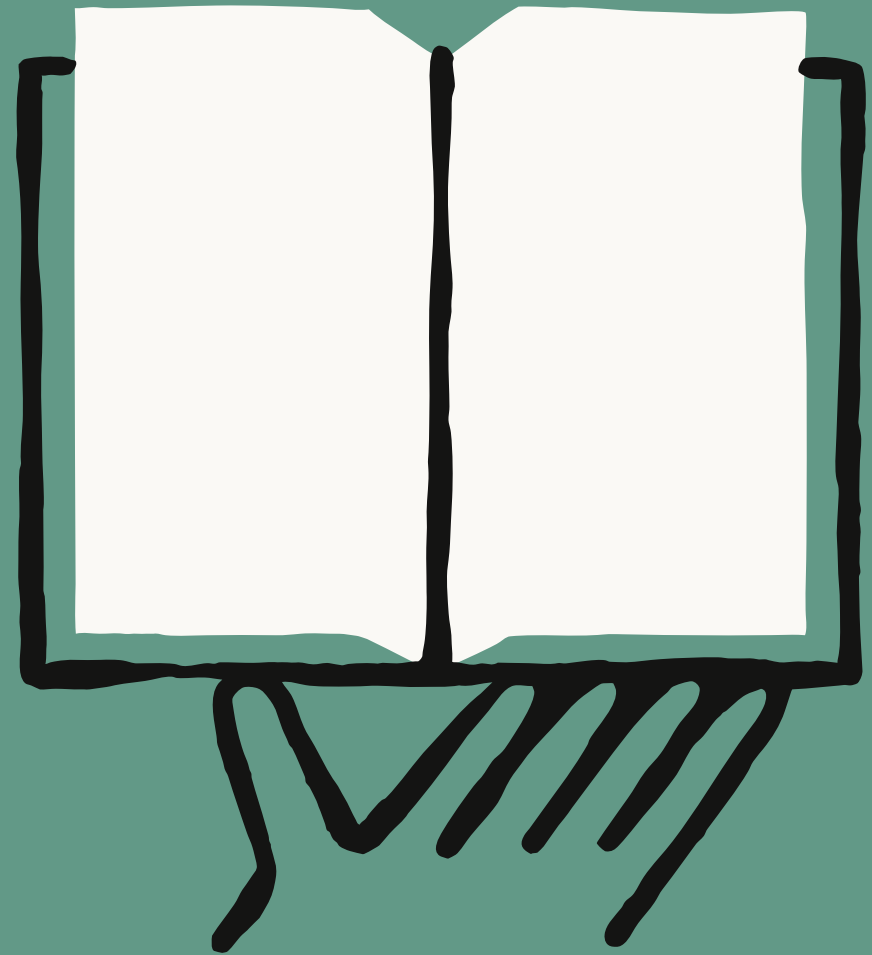


Pillar 03: Code

Engineers and quants

The on-ramp. Conversational access for drafting, research, analysis, and Q&A — in the browser and embedded in Microsoft 365.

- Legacy COBOL and Java migration
- Quant notebooks and models
- Test and review automation



Chapter 1

Product overview

Product overview

Claude shows up to work in two forms: **products** your teams use directly such as Claude Chat, Claude Cowork, Claude Code, and the Microsoft 365 add-ins, as well as the **Claude Platform**, for firms building and running their own applications and agents.

Claude Chat

The Claude web and desktop app, at [Claude.ai](https://claude.ai), is a chat interface for research and drafting. An analyst might use it, for example, to summarize an earnings transcript or pressure-test a thesis before a memo goes to the committee. It is often the first place a new user starts.

Claude Cowork

Claude Cowork is a desktop application where Claude works across local files and connected apps to complete multi-step projects. It can read and write local documents, call connected services such as Google Drive, Gmail, Box, and Asana, and coordinate multi-step work across files and apps. Examples of the kind of project this is suited to include building a pitch book, reconciling a month-end close, or preparing a board packet.

Claude Code

Claude Code is a command-line interface for technical teams: quantitative researchers, data engineers, and platform teams building internal tools. Finance firms use Claude Code to write and audit quantitative code, including trading logic and data pipelines under version control.

Claude for Microsoft 365

Teams can use Claude within the Microsoft 365 suite in two ways. Add-ins from the Microsoft Marketplace put Claude inside Outlook, **Excel**, **PowerPoint**, and **Word**, so an analyst can **update a financial model** built in Excel, explain it with cell-level citations, and turn it into a slide **without leaving the app**.

The **Microsoft 365 connector** lets Claude search and analyze content in Outlook, Teams, SharePoint, and OneDrive from chat, Cowork, or the add-ins. Context carries across the suite, so a model built in Excel can be turned into a slide or a client email without the analyst rebuilding anything.

Claude Platform

The Claude Platform is Anthropic's API for firms building their own applications on Claude. Quantitative teams, platform engineers, and internal tools teams use it to embed Claude directly into trading platforms, risk systems, KYC and underwriting applications, and other production workflows.

Claude Managed Agents

Claude Managed Agents is Anthropic's suite of composable APIs for building and deploying cloud-hosted agents on the Claude Platform. A firm builds an agent on the platform and Anthropic runs it as a cloud service, with the production scaffolding Managed Agents provides (long running sessions, scoped permissions, managed credential vaults, and full execution tracing built in). Financial services firms use Managed Agents to run agents programmatically, for example, a Valuation Reviewer agent handling month-end reconciliation across a multi-hour close.

Claude product matrix: when to use what

Surface	Best for	Primary users	Where it runs	Example task
Claude Chat	Conversational drafting, research, and analysis in a chat interface	Anyone	Browser, desktop, mobile	"Summarize this report and draft a response."
Claude Code	Agentic coding inside a repo — building, refactoring, testing	Developers	Terminal, IDE	"Refactor this module and run the tests."
Claude Cowork	Cross-app knowledge work that touches files and multiple tools	Knowledge workers (analysts, PMs, operators, researchers)	Claude desktop app	"Read the five vendor PDFs in my Downloads folder, compare them on price and SLAs, and put the result in a spreadsheet."
Claude for Microsoft 365	In-place drafting, modeling, and editing across the Microsoft 365 suite; context carries across apps	Knowledge workers (analysts, PMs, operators, researchers)	Outlook, Excel, PowerPoint, Word (add-ins); Teams, SharePoint, OneDrive (via M365 connector)	"Update this DCF with the new guidance and turn it into a three-slide deck."
Claude Platform (API)	Building custom applications on Claude; embedding Claude into internal systems and production workflows	Developers, quantitative teams, platform and engineering teams	Anthropic API, Amazon Bedrock, Google Vertex AI, Microsoft Foundry	"Add Claude to our advisor platform to draft personalized portfolio commentary at scale, with a human in the loop."
Claude Managed Agents	Running custom agents as hosted cloud services with Anthropic handling the runtime	Platform and engineering teams	Claude Platform (hosted by Anthropic)	"Deploy our Valuation Reviewer agent as a managed service with scoped permissions and audit tracing."

Customizing Claude: connectors, skills, and plugins

Claude becomes specific to a financial services firm through three building blocks: **connectors** that give it access to the firm's data, **skills** that teach it how to complete specific tasks in a repeatable way, and **plugins** that bundle skills, subagents, and connectors into installable packages for a specific job.

MCP Connectors

MCP Connectors give Claude access to a specific data source over the **Model Context Protocol (MCP)**, an open standard that lets Claude query the provider's system directly rather than working off an uploaded copy. This is important for firms with strict data-residency or entitlement requirements.

Skills

Skills are reusable, encoded workflows—instructions, templates, and optionally scripts—that teach Claude how to complete specific tasks in a repeatable way. They are especially valuable in heavily regulated industries like financial services and insurance, where consistency matters.

Skills are best used for work that follows a standard format. For example, a credit memo skill captures the firm's template, required disclosures, and formatting, and a KYC skill captures the onboarding checks the compliance team runs on every new client.

Anthropic has pre-built skills for **PDF**, **Word**, **Excel**, and **PowerPoint** creation. Firms can also build their own skills. Simple skills are written in Markdown with no code; more advanced ones can include executable scripts. Either way, skills are then uploaded in Claude.ai settings (via the customize tab in both web and desktop), Claude Code, or the API.

MCP connectors relevant to financial services firms:

Credit and risk data:



Market and company data:



Industry research and expert networks:



News and real-time feeds:



Diligence and data rooms:



Productivity and collaboration:



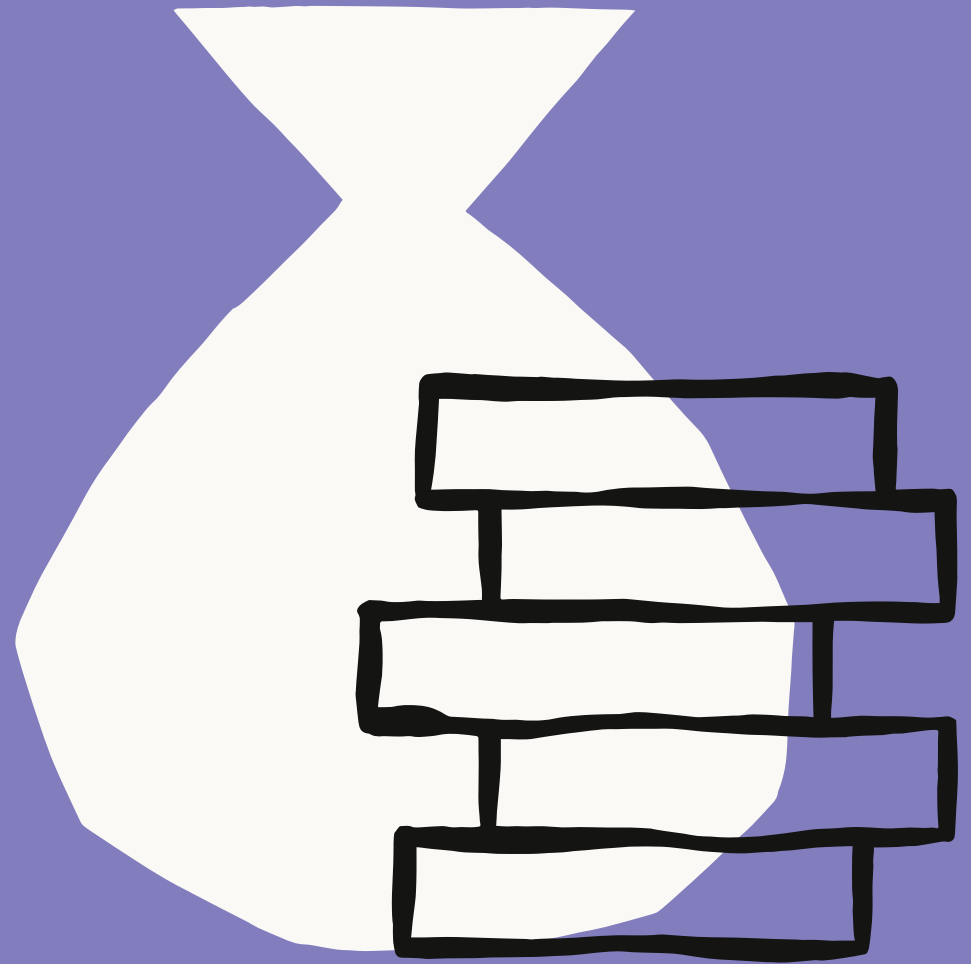
Pre-built finance agent reference architectures

Anthropic has shipped ten pre-built agent reference architectures for financial services work that packages up the skills, tools, and data connections a specific workflow needs into a template. Firms can then customize those templates to their modeling standards, data sources, and review steps.

Examples include:

Research and client coverage	Finance and operations
<ul style="list-style-type: none">• Pitch builder creates target lists, runs comparables, and drafts pitchbooks for client meetings;• Meeting preparer assembles client and counterparty briefs ahead of calls;• Earnings reviewer reads transcripts and filings, updates models, and flags thesis-relevant changes;• Model builder builds and maintains financial models from filings, data feeds, and analyst inputs.• Market researcher: tracks sector and issuer developments, synthesizes news, filings, and broker research, and flags items for credit and risk review.	<ul style="list-style-type: none">• General ledger reconciler reconciles general ledger accounts and runs net asset value calculations against the books of record;• KYC screener assembles entity files, reviews source documents, and packages escalations for compliance review;• Month-end closer runs the close checklist, prepares journal entries, and produces close reports;• Statement auditor reviews financial statements for consistency, completeness, and audit-readiness;• Valuation reviewer checks valuations against comparables, methodology, and the firm's review standards;

Each role can run as a plugin in Cowork and the Microsoft 365 add-ins for desktop use with a human in the loop, or via Claude Managed Agents in the Claude Platform. Either way, analysts stay in the loop, reviewing, iterating on, and approving the agent's outputs before anything moves downstream.



Chapter 2

Building an AI-first financial enterprise: real-world examples

Building an AI-first financial enterprise: real-world examples

Claude is changing how financial services teams work, from investment banking to wealth management to insurance. The firms adopting AI across their workloads, whether front-office or back-office, are reporting meaningful shifts in how analyst and specialist hours are spent, and in how efficiently work gets done.

AIG is using Claude inside underwriting to compress review timelines by more than 5x in early rollouts and raise data accuracy from 75% to over 90%.

[Read the announcement.](#)

"Our partnership with Anthropic will fundamentally transform how we approach underwriting at scale... This collaboration is about propelling growth and providing our underwriters the tools to make better decisions at an accelerated pace, ultimately driving our ability to serve more clients with greater insight."

— *Peter Zaffino, CEO, AIG*

IG Group, a global online trading and financial services firm, has streamlined internal processes across teams, with the analytics function alone saving 70 hours a week on AI-assisted analytics and query handling. [Read the customer story.](#)

"We achieved full ROI within the first three months, through productivity improvements, speed-to-market gains, and agency cost reductions. In some use cases, productivity increased by 100%, beyond my wildest expectations."

— *Olga Pirog, Global Head of Data and AI Transformation, IG Group*

Commonwealth Bank of Australia is building its AI transformation on Claude, with early focus on fraud prevention and customer service enhancement.

[Read the announcement.](#)

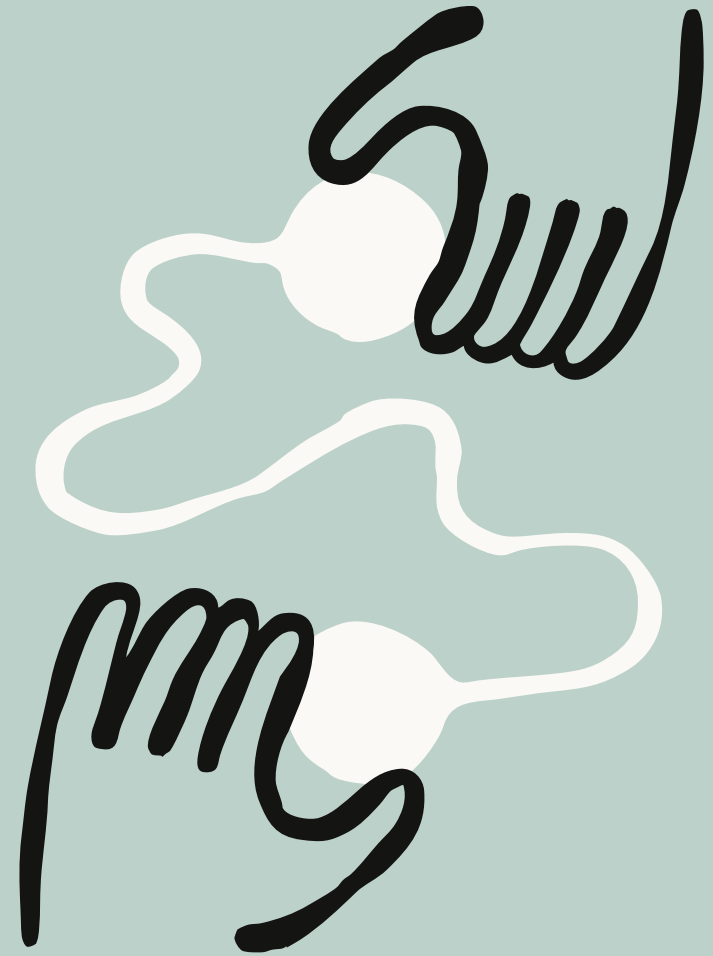
"Our strategic partnership with Anthropic is foundational to our success and our strategy to become a global leader in AI innovation in banking. Claude's advanced capabilities, combined with Anthropic's commitment to safety, are central to our purpose of harnessing AI responsibly, as we drive for transformation in critical areas like fraud prevention & customer service enhancement."

— *Rodrigo Castillo, Chief Technology Officer, Commonwealth Bank of Australia*

Moody's is building an MCP application that brings its credit analysis and compliance agents directly into Claude's environment. Powered by Moody's connected intelligence of 600M+ entities, 2 billion ownership links, and cross-domain risk data, these agents have already cut credit memo prep time from 40 hours to 2 minutes. [Read the press release.](#)

"As AI becomes the interface for decisions, trust becomes the standard. Moody's decision-grade connected intelligence is key to unlocking AI for high-stakes credit and compliance decision-making."

— *Rob Fauber, President & Chief Executive Officer, Moody's*



Chapter 3

Claude adoption roadmap

Claude adoption roadmap

Most successful Claude rollouts follow this sequence: the team lays the foundation for a pilot program, runs a pilot, and scales out to the rest of the organization.

[Anthropic's recommended adoption playbook](#) maps out these three phases.

Phase 1: Lay the foundation

Before launching a Claude pilot program, the responsible team needs to put all access and connectors in place. For most firms, this means standing up Claude on the first-party API, Amazon Bedrock, Google Vertex AI, or Microsoft Foundry—whichever keeps Claude inside the firm's existing cloud perimeter. Enterprise controls for SSO, SCIM, audit logs, and custom data retention need to be configured at this stage. Scope governance in parallel: model risk management, SEC/FINRA alignment, and data-privacy (GDPR/CCPA) review should run alongside access setup.

The connector set usually starts with the Microsoft 365 connector for Outlook, Teams, SharePoint, and OneDrive access, plus one or two market data research or document providers that the pilot team uses. Those could be FactSet, S&P Capital IQ, Morningstar, Moody's, Chronograph, Egnyte, etc. Firms can install these a la carte as MCP connectors, or access them inside one of [Anthropic's finance plugins](#) (note: they still need to be set up individually).

Next, choose the teams that will be using the pilot and let them surface use cases that matter to their function rather than prescribing from above. Choose two or three champion teams rather than one. A single team gives you one data point, while two or three teams will tell you whether, for example, the time savings and quality gains are repeatable or came from one team's motivation and skill. Pick teams with a motivated lead who's already experimenting with AI, as they are likely to surface the real use cases faster.

Pick work that's document-heavy and standard-shape. For front-office work,

that might be creating the first draft of a research note, a pitch book section, or a credit memo. In back-office, that could be a KYC file review, a regulatory filing, or a claims summary. Avoid piloting Claude on novel or high-stakes work.

Pro-tip: Have your champions leverage pre-configured plugins so they get value in the first session. The cold-start problem is real: if someone opens Claude Cowork and doesn't know what to do, they'll close it. But if they open it, type / morning-briefing, and get something useful in ninety seconds, they return.

Phase 2: Pilot

At this stage, champions are running real workflows with real data and measuring the pilot's success against criteria you have defined upfront. Time saved is a common metric used here, tracking the team's cycle time on the pilot job before and after Claude. Another one is how often a user keeps Claude's draft without a meaningful rewrite. Together, these two criteria help you assess whether the pilot is working.

Another strong signal that a pilot is working is when champions start to build their own skills. For example, a credit analyst takes the memo workflow she's been running by hand and turns it into a skill with the firm's template, credit policy, and approval flow embedded, and that is now a skill the rest of the org can begin using immediately.

In most pilots, Claude's product surfaces come online in a specific order. Skills and plugins come first because they're low-risk and high-reuse. The Microsoft 365 add-ins come next, extending what a pilot team has built into Excel, PowerPoint, Word, and Outlook, where the bulk of front- and back-office work actually happens. Claude Cowork tends to come in at the back end of the pilot, when the team's ready to move from single-document work to project-level work that spans files and apps.

Pro-tip: Schedule weekly check-ins with your pilot teams; they surface edge cases fast and you want to hear about them while they're fresh and in time to course-correct before a wider rollout.

Phase 3: Scale

At this stage, plugins and skills that worked during the pilot are being rolled out to more teams across the organization through admin-managed plugin marketplaces. New hires benefit as well, as they start on day one with already encoded workflows. Onboarding is faster and the whole team can work more efficiently.

Over time, skills begin compounding across teams. A skill built for one team can be adapted for another when their work shares workflows or structure. For example, a fraud review workflow and an AML check workflow share most of their structure. Adding a second team usually goes faster than the first, and the firm's skill library grows.

Pro-tip: Provision plugins at the admin level rather than letting individuals install them ad hoc. Admin-provisioned plugins give you consistency across teams, security controls from the first user, and a single place to push updates when you improve a workflow.

The table below summarizes the actions you would take at each stage and what you can expect to see as you go through rollout.

Phase	Actions	Phase
Foundation	Security review. Identify 2-3 champion teams. Install pre-built plugins. Connect 1-2 core systems.	Champions reporting back use cases. First "this saved me an hour" moments.
Pilot	Champions run real workflows. Weekly check-ins. Measure against defined criteria. Demo wins to adjacent teams.	Measurable time savings. Champions building and scheduling custom skills. Pull from other teams.
Scale	Admin-provisioned plugin marketplace. Encode pilot learnings as org-wide skills. Onboard the next wave of users.	Skills shared across teams. New hires ramping on encoded workflows. Declining support tickets for "how do I do this."

Industry use cases

The work financial services teams tend to bring to Claude first is output-heavy (spreadsheets, presentations, documents), follows a standard shape, and gets reviewed by a senior person before it ships. For example, Claude takes on the drafting so reviewers can focus on the work that requires judgment. The sections below show what that looks like across four financial services sectors. They are illustrative, rather than exhaustive.

If your team is doing interesting and impactful work with Claude that we haven't mentioned here, reach out at sales@anthropic.com.

Investment banking and private equity

Teams spend most of their time on documents that need to get built fast and are reviewed by senior bankers. Claude speeds up the drafting, saving analysts hours and reducing deal cycle times with:

- Pitch book drafting
- **Comps tables and valuations support**
- CIM / teaser creation
- LBO model build and analysis

Retail and commercial banking

Teams spend the majority of their time on documents that follow standard formats. Claude can reduce turnaround times for underwriting and improve coverage ratios with:

- Branch P&L reporting
- Branch policy and procedure lookup for frontline staff
- Deal origination pitches

Wealth and asset management

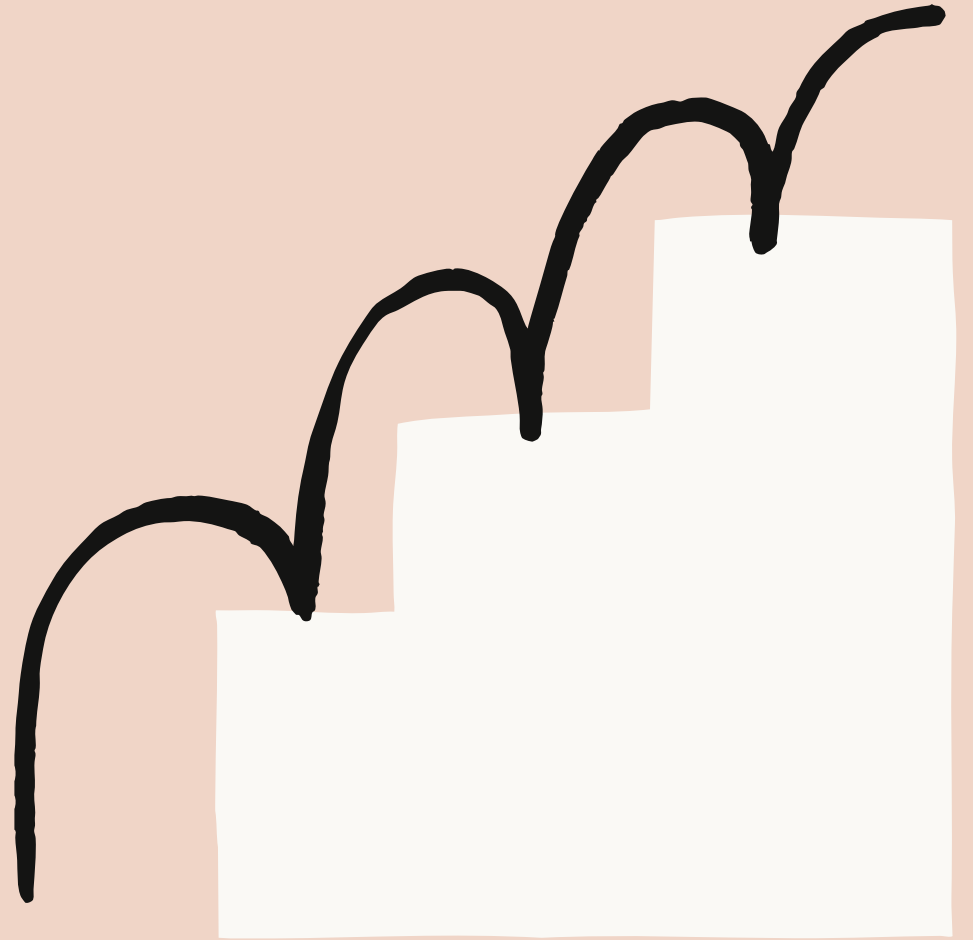
Portfolio managers and client-facing teams need to turn positions, performance, and research into material a client can read. Claude handles the document production so the PM can spend time on judgment calls and can enable higher AUM per advisor, reduced reporting time, and lower recon error rates with:

- **Portfolio reporting and investment committee memos**
- LBO model build and review
- Performance decks
- **Month-end close and reconciliation support**

Insurance

Insurance work sits across a mix of structured data and unstructured documents, much of it in regulated filings. Claude can improve accuracy across the books, from filing accuracy to effective tax rates and recon error rates with:

- Actuarial workbook review
- Regulatory filing slides prep
- Scenario and liability modeling



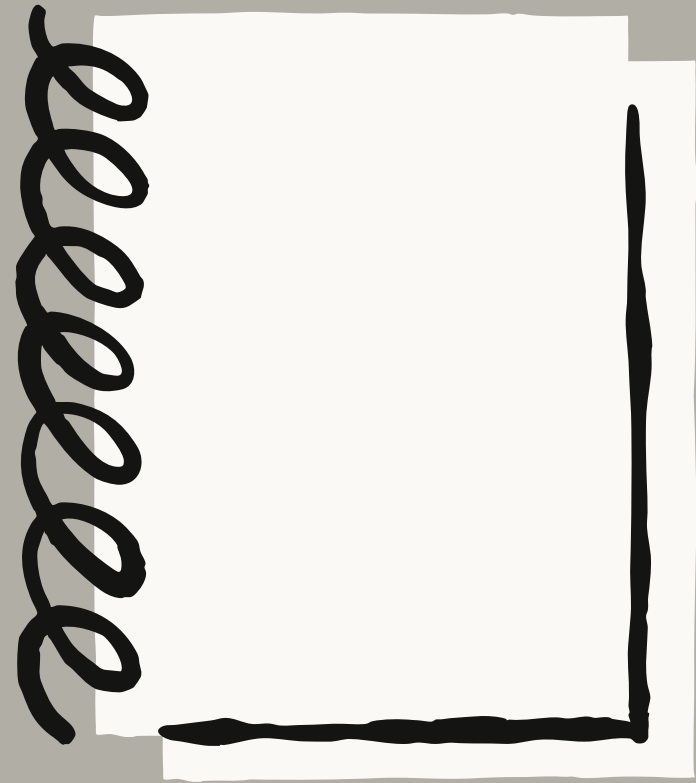
Chapter 4

Getting started

Getting started

The Claude ecosystem for financial services spans connectors, plugins, partner MCP apps, and ten pre-built agent roles for front- and back-office work. All of it runs on the **enterprise controls regulated firms require**, including SSO, SCIM, **audit logs, custom data retention**, and **ISO/IEC 42001:2023 certification**.

To explore how Claude fits your firm, visit **Claude for Financial Services** or contact your Anthropic account team at **sales@anthropic.com**.



Resources

Resources

- **Claude for financial services**: a high-level overview of how Claude helps financial institutions improve how they serve markets and manage risk.
- **Finance tutorials on Claude.com**: step-by-step guides covering financial analysis workflows, using PitchBook and FactSet for research, installing the financial services plugins, Excel-based modeling, and more.
- **Claude skills catalog**: Anthropic's public catalog of community-contributed skills, useful for finding pre-built skills before authoring your own.
- **Open-source financial services plugins repository**: The GitHub repo where Anthropic publishes the finance plugins covered in this guide.
- **Case study: Newfront modernizes insurance experiences with Claude**: A modern insurance brokerage uses Claude to automate tedious insurance tasks and provide instant support to its 20% market share of US unicorn startups.
- **Case study: Hebbia helps knowledge workers save thousands of hours with Claude**: Built on Claude, this AI platform for knowledge work serves over a third of the top 50 asset managers and Tier 1 investment banks and law firms.



claude.ai