Google Cloud

Google AI Integration for Financial Services

Key information

Course code	Google AI Integration for Financial Services
Course version	1.0
Course title	Google AI Integration for Financial Services
Description	This course equips Financial Services professionals with the skills to leverage Google AI tools, including Gemini, and NotebookLM Enterprise. You'll learn to enhance financial analysis, reporting, and client communication, develop specialized tools like early warning systems and tailored investor narratives with Gemini Gems, securely query and synthesize information from diverse financial documents, and automate routine tasks and proactively monitor financial data. Implement AI-driven solutions effectively and ethically to streamline financial operations.
What you'll learn	• Utilize the core features of **Gemini** to enhance financial report analysis, client communication, and presentation preparation. • Apply advanced **Gemini capabilities (Gems)** to develop highly customized early warning systems and craft tailored investor narratives for strategic financial analysis. • Leverage **NotebookLM Enterprise** to securely query and synthesize information from diverse financial reports, regulatory documents, and client files for accurate, source-verified insights.
Duration	3 hours
Level	Intermediate
Format (please leave only applicable)	Instructor-led

Content overview

Who this course is for	Financial Analysts, Portfolio Managers, Client Advisors, Investment Bankers, Compliance Officers, Accountants.
Total modules	4
Total videos	0
Total Labs	0
Total classroom activities	0
Prerequisites	Basic Google Apps familiarity, Google Workspace skills, Gemini familiarity, basic NotebookLM skills, Financial terms, Data security awareness
Products	Gemini for Google Workspace Google Gemini Google Gemini Gems NotebookLM
Not covered	Theory and in-depth explanations of Google AI tools. The course requires a basic-level understanding of the tools and what each one offers.

Content breakdown

Module 1 title	Gemini for Workspace Integration
Module 1 topics	Use case 1: Summarizing quarterly financial reports Use case 2: Analyzing financial data trends in Sheets Use case 3: Drafting client communication

	Use case 4: Creating presentation outlines Use case 5: Summarizing earnings call transcripts
Module 1 objectives	• Identify Gemini features applicable to specific financial tasks and data analysis. • Demonstrate the use of Gemini to draft financial reports and client communications. • Compare the efficiency of completing financial tasks with and without the integration of Gemini features. • Explain the potential time savings and improved clarity gained by leveraging Gemini in financial workflows.
Module 1 activities	5 use case demos
Module 2 title	Gemini Gems Integration
Module 2 topics	Use Case 1: Developing a customized Early Warning Indicator (EWI) dashboard framework Use case 2: Structuring a post-mortem analysis framework for financial performance deviations Use case 3: Generating tailored Investor Relations (IR) narrative themes
Module 2 objectives	• Analyze the inefficiencies of manual financial processes that custom Gems can address. • Design and refine custom Financial Gems using effective prompting techniques to automate specific tasks. • Apply custom Financial Gems in relevant use cases to streamline financial workflows. • Explain the benefits of creating custom Financial Gems, including efficiency, clarity, and cost-effectiveness.
Module 2 activities	3 use case demos
Module 3 title	NotebookLM Enterprise Integration
Module 3 topics	Use case 1: Analyzing and comparing quarterly/annual reports

	Use case 2: Preparing for specific client meetings Use case 3: Querying regulatory documents and compliance policies Use case 4: Summarizing investment research and earnings call transcripts Use Case 5: Assisting due diligence document review Use Case 6: Creating client education podcast content outlines
Module 3 objectives	• Review the steps to upload financial source documents and create a notebook in NotebookLM. • Apply NotebookLM to answer specific financial analysis questions using the provided source materials. • Differentiate between summaries generated by NotebookLM and manually created ones. • Assess the reliability and accuracy of content drafted by NotebookLM by verifying its source citations.
Module 3 activities	6 use case demos