

Google AI Integration for Financial Services

This course is designed to help financial service professionals discover how to integrate Google AI tools into their daily operations to optimize productivity and decision-making. Participants will explore the application of Gemini, Gemini Notebook, and AgentSpace in automating report generation, analyzing financial data, and improving client interactions. The course will also cover strategies for maintaining data security and compliance while utilizing AI technologies.

**DURATION**

2-3 hours

**LEVEL**

100 - Introductory

**FORMAT**

Instructor-led

**SCALABLE**

1-50, scaled to 1000

What you'll learn

- Explain how Gemini for Workspace can aid in financial report generation and analysis.
- Utilize Gemini to summarize financial news and draft client communications.
- Assess the potential of Gemini to enhance accuracy and speed in financial tasks.
- Formulate strategies for using Gemini to improve compliance documentation.
- Generate insights from financial data using Gemini to inform decision-making.
- Use Gemini Notebook to analyze financial documents, prepare for meetings, and query regulatory information.
- Automate repetitive financial service workflows using AgentSpace to increase operational efficiency and accuracy.

Overview	3 modules
Who this course is for	Financial Analysts, Investment Bankers, Portfolio Managers, Risk Managers, Compliance Officers
Products	- Gemini Enterprise - Gemini Notebook Enterprise - Agent Studio on Gemini Enterprise Agent Platform - Google Agentspace
Prerequisites	Google Workspace basics, Financial terms, Data security awareness.

Module
01

Gemini for Workspace Integration

- | | |
|------------|---|
| Objectives | <ul style="list-style-type: none">Participants will learn to use Gemini to automate financial reporting, analyze data, and improve client communications. |
|------------|---|

Module
02

Gemini Notebook Enterprise Integration

- | | |
|------------|--|
| Objectives | <ul style="list-style-type: none">Participants will learn to use Gemini Notebook to analyze financial documents, prepare for meetings, and query regulatory information. |
|------------|--|

Module
03

AgentSpace Integration

- | | |
|------------|--|
| Objectives | <ul style="list-style-type: none">Participants will learn to automate repetitive financial service tasks using AgentSpace, increasing efficiency and accuracy. |
|------------|--|