AI Applications in Financial Planning and Education

Speakers:
Chet Bennetts
Eric Ludwig
Matt Goren

NAPFA CE Credits: 1.5
CFP® CE Credits: 1.5

Generative AI (artificial intelligence) such as ChatGPT is transforming financial planning and financial education. This session will review the latest developments in generative AI, from its potential to automate routine client communications to its uncanny capability to mimic human speech. Attend this session to gain actionable insights for financial planners seeking to harness AI’s capabilities. The presenters will demonstrate how AI and subject matter expertise can partner to rapidly develop best-in-class financial education. Throughout, the audience will engage in interactive discussions, witness real-world applications, and discover how AI can revolutionize client interactions, decision-making processes, and service delivery.

Learning Objectives:

1. Describe the latest developments in generative AI in the financial planning context
2. Define actionable opportunities for financial planners to leverage AI’s capabilities with clients
3. Define a step by-step process for utilizing generative AI to create financial planning and financial education content.