2026 GLOBAL FINANCE TRENDS SURVEY REPORT

SYNCHRONIZE

The Modern CFO: Aligning Priorities, Technology and Talent

FEI Central Pennsylvania – November 17, 2026





Our Speakers



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Agenda

01

CFO priorities and transformation pressures
Explore the risks, opportunities and workforce challenges shaping today's finance agenda.

02

AI adoption, readiness and value
Evaluate finance use cases, organizational readiness and approaches for maximizing AI ROI

03

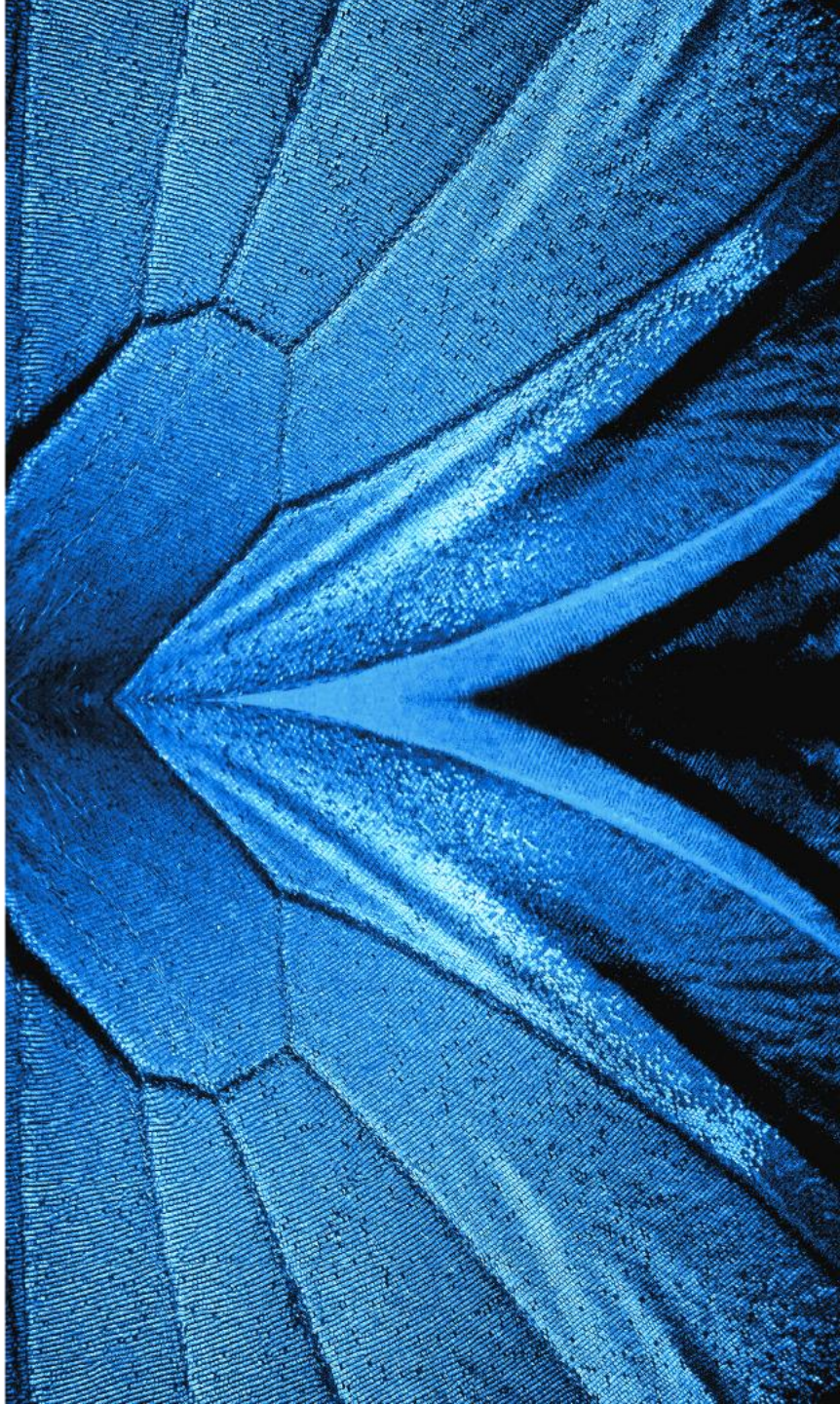
Talent and skills for the future finance function
Examine strategies for developing, hiring and augmenting the capabilities needed to enable transformation

04

Analytics, FP&A and dynamic planning
Identify how advanced analytics and integrated planning can improve forecasting, profitability visibility and decision-making.

05

Trusted data, cybersecurity and early warning
Strengthen the data, governance and risk foundations required to scale AI and respond more quickly to change.



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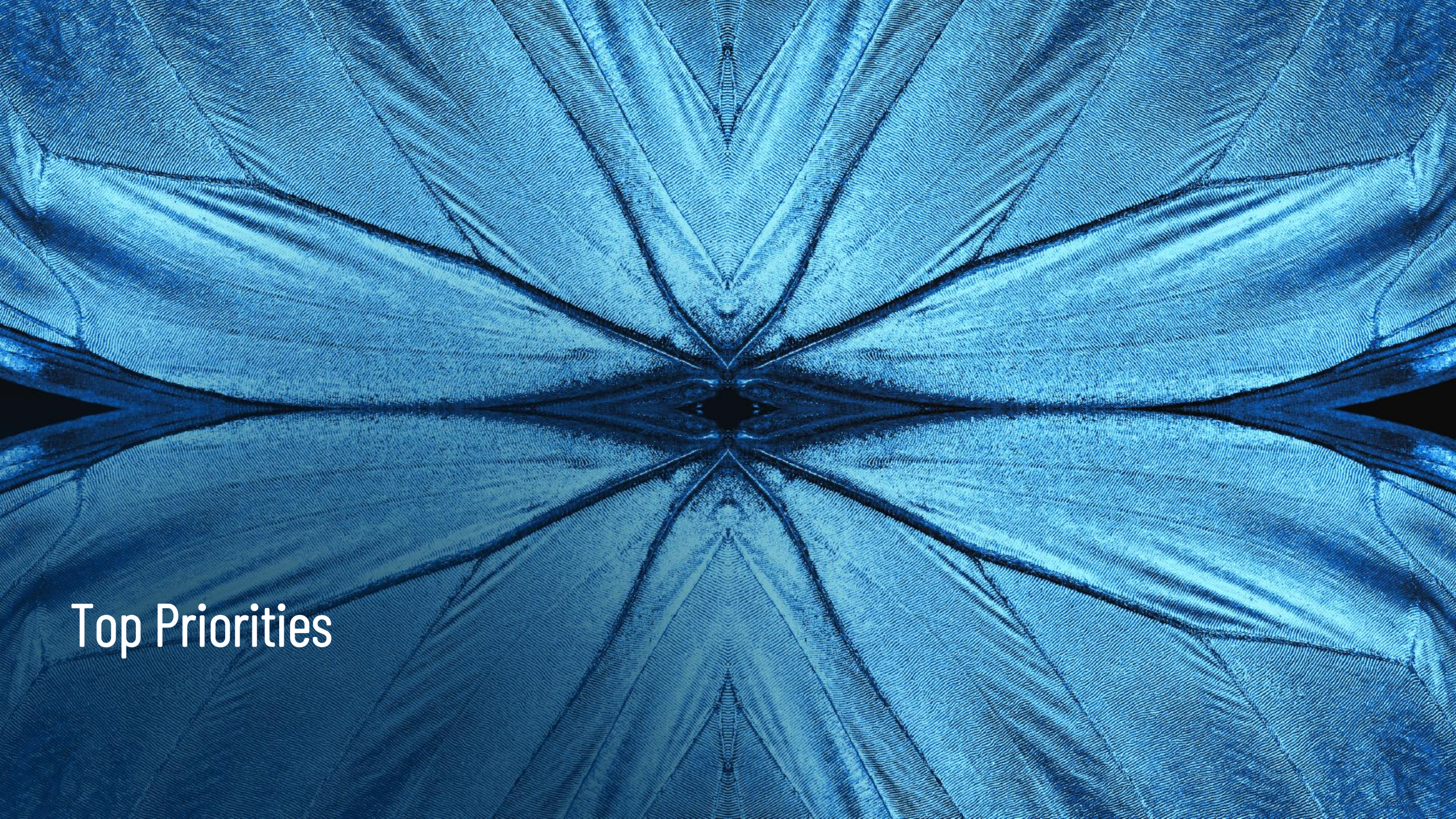
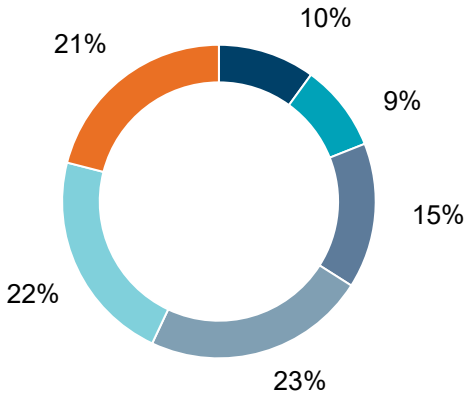

Top Priorities

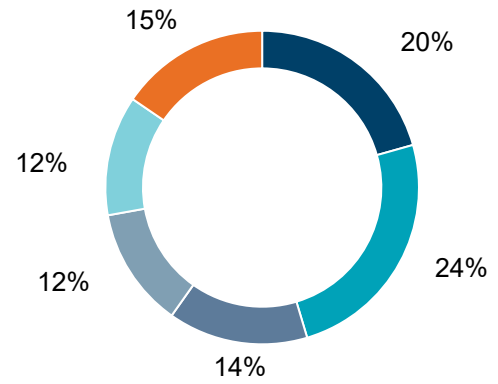
Methodology and Demographics

Size of organization (outside of financial services) – by gross annual revenue in U.S. Dollars



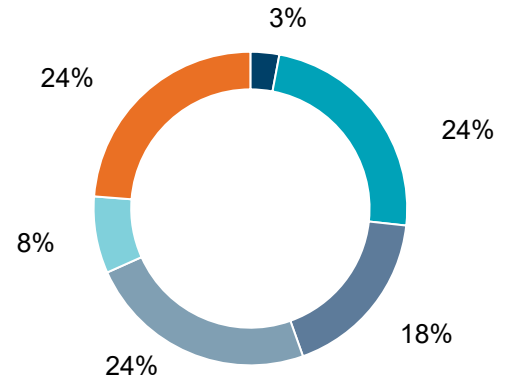
$20 billion or greater	**10%**
$10 billion - $19.99 billion	**9%**
$5 billion - $9.99 billion	**15%**
$1 billion - $4.99 billion	**23%**
$500 million - $999.99 million	**22%**
$100 million - $499.99 million	**21%**

Size of organization (within financial services) – by assets under management in U.S. Dollars



$250 billion or greater	**20%**
$50 billion - $249.99 billion	**24%**
$25 billion - $49.99 billion	**14%**
$10 billion - $24.99 billion	**12%**
$5 billion - $9.99 billion	**12%**
$1 billion - $4.99 billion	**15%**

Size of government agency – by annual budget in U.S. Dollars



$50 billion or more	**3%**
$10 billion - $49.99 billion	**24%**
$ 5 billion - $9.99 million	**18%**
$1 billion - $4.99 billion	**24%**
$500 million - $999.99 million	**8%**
$100 million - $499.99 million	**24%**

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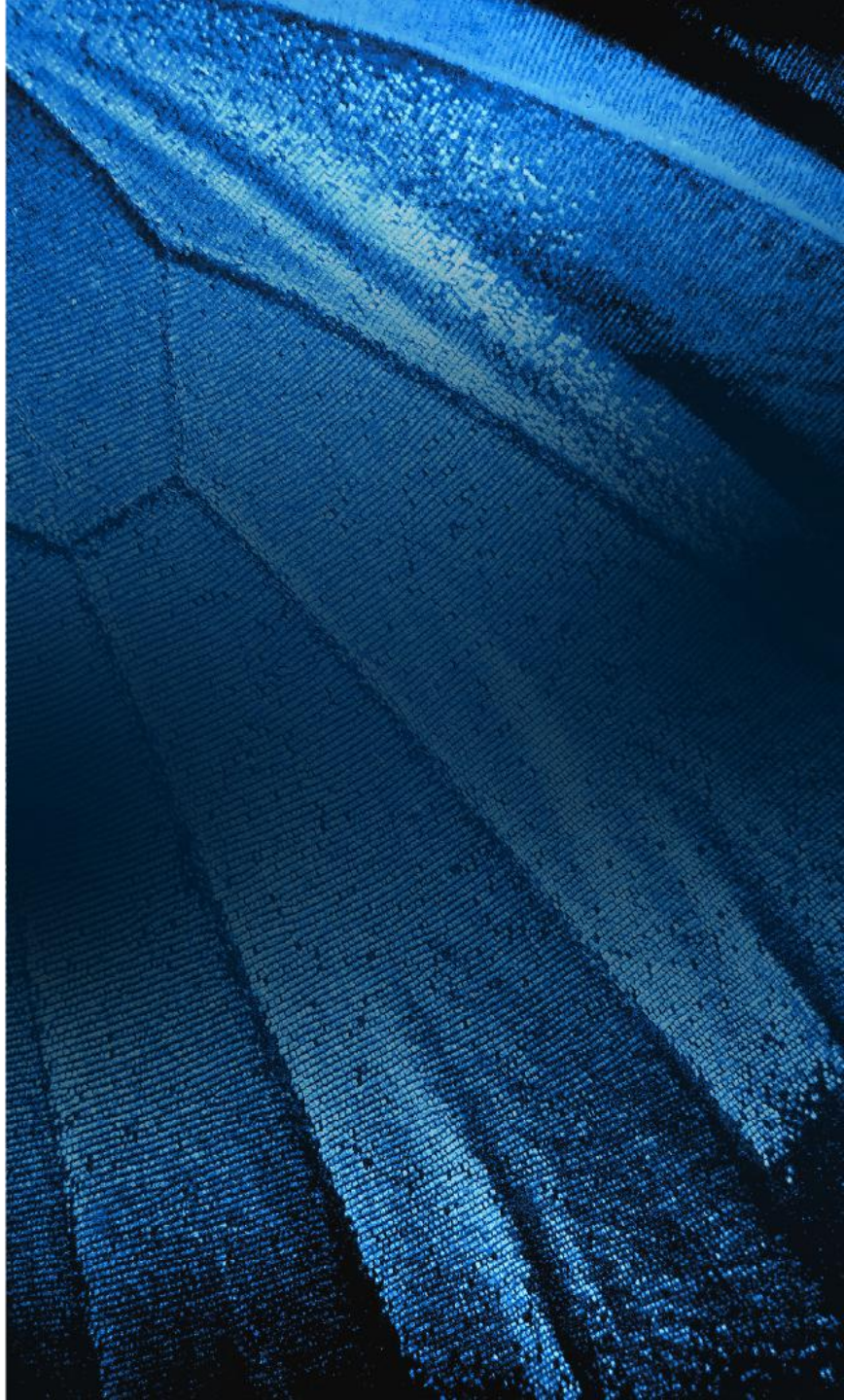
Polling Question #1

What is your top priority for the finance organization over the next 12 months?

A. Security & privacy of data
B. Financial planning and profitability analysis and reporting
C. Enhanced data analytics
D. Process improvement
E. Strategic planning



Top Finance Priorities

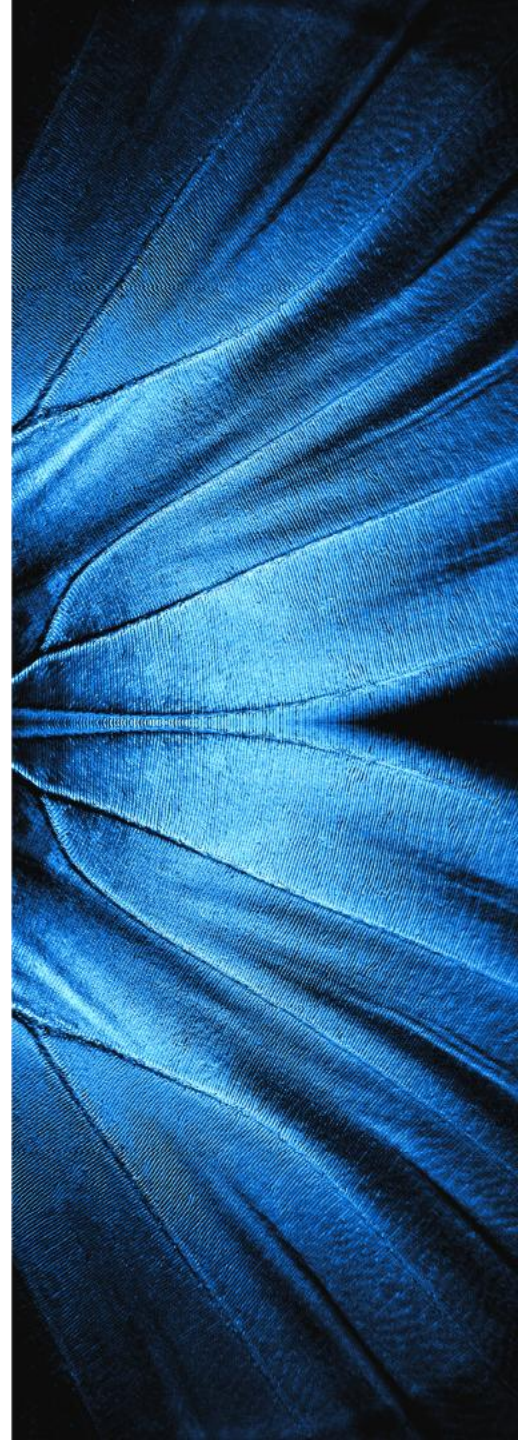
Question: Please rate the following areas based on a 10-point scale, where "1" reflects the lowest priority and "10" reflects the highest priority for the finance function to improve its knowledge and capabilities over the next 12 months.
(Shown: All responses)

2026 Rank	Area	2025 Rank
1	Security and privacy of data	1
2	Financial planning and profitability analysis and reporting	3
3	Enhanced data analytics	7
4	Process improvement	4
5	Strategic planning	2
6	AI	13
7	Changing demands and expectations of internal customers	10
8	SaaS and cloud-based applications	11
9	Change management	9
10	Leadership (within your organization)	5
11	The changing roles of human resources, leadership & development, and recruiting	15
12	Routine reporting and closing activities	6
13	Tax changes	14
14	Transaction planning and readiness	12
15	ESG metrics and measurement	8

*These rankings accurately reflect the full averages for each risk issue, despite the appearance of some virtual ties

Top Priorities: Key Themes

	Top 10 Priority Areas	AI / Business Transformation	Data Analytics / FP&A	Cyber
1	Security and privacy of data	•	•	•
2	Financial planning and profitability analysis and reporting	•	•	
3	Enhanced data analytics	•	•	•
4	Process improvement	•		
5	Strategic planning	•	•	
6	AI	•	•	•
7	Changing demands and expectations of internal customers	•	•	
8	SaaS and cloud-based applications	•		•
9	Change management	•	•	
10	Leadership (within your organization)	•	•	



Key Findings

01

AI is becoming a standard tool in finance, but the real transformation stems from how organizations combine AI with broader automation and modernization initiatives.
More than three out of four finance teams use AI for forecasting, risk management and process automation, demonstrating that success depends not just on AI adoption, but on building a more automated and modern finance operating model.

02

Security and privacy of data remains the top finance priority for the third consecutive year.
For the third year in a row, finance leaders ranked data security and privacy as their top priority. As organizations rely more on AI, analytics and cloud technologies, protecting sensitive data has become a critical foundation for transformation.

03

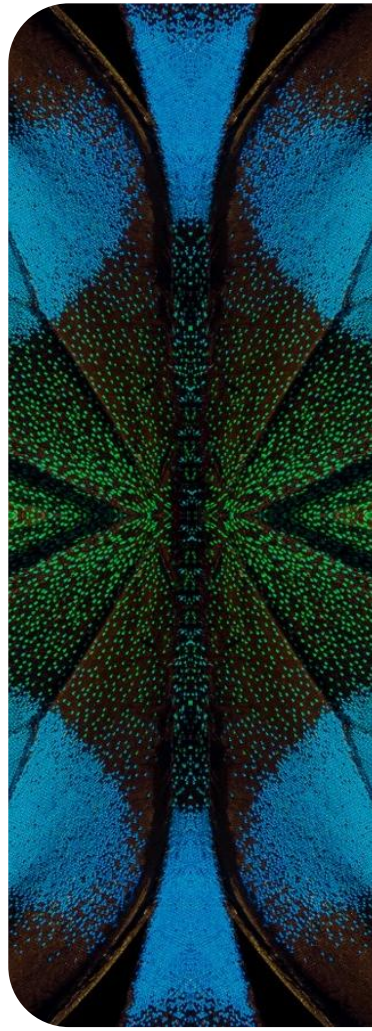
Finance is better at measuring ROI from business transformation initiatives than from AI programs.
Many organizations are better at measuring the impact of broader transformation initiatives than AI-specific investments. As AI adoption grows, finance leaders are looking for clearer ways to connect technology investments to business outcomes.

04

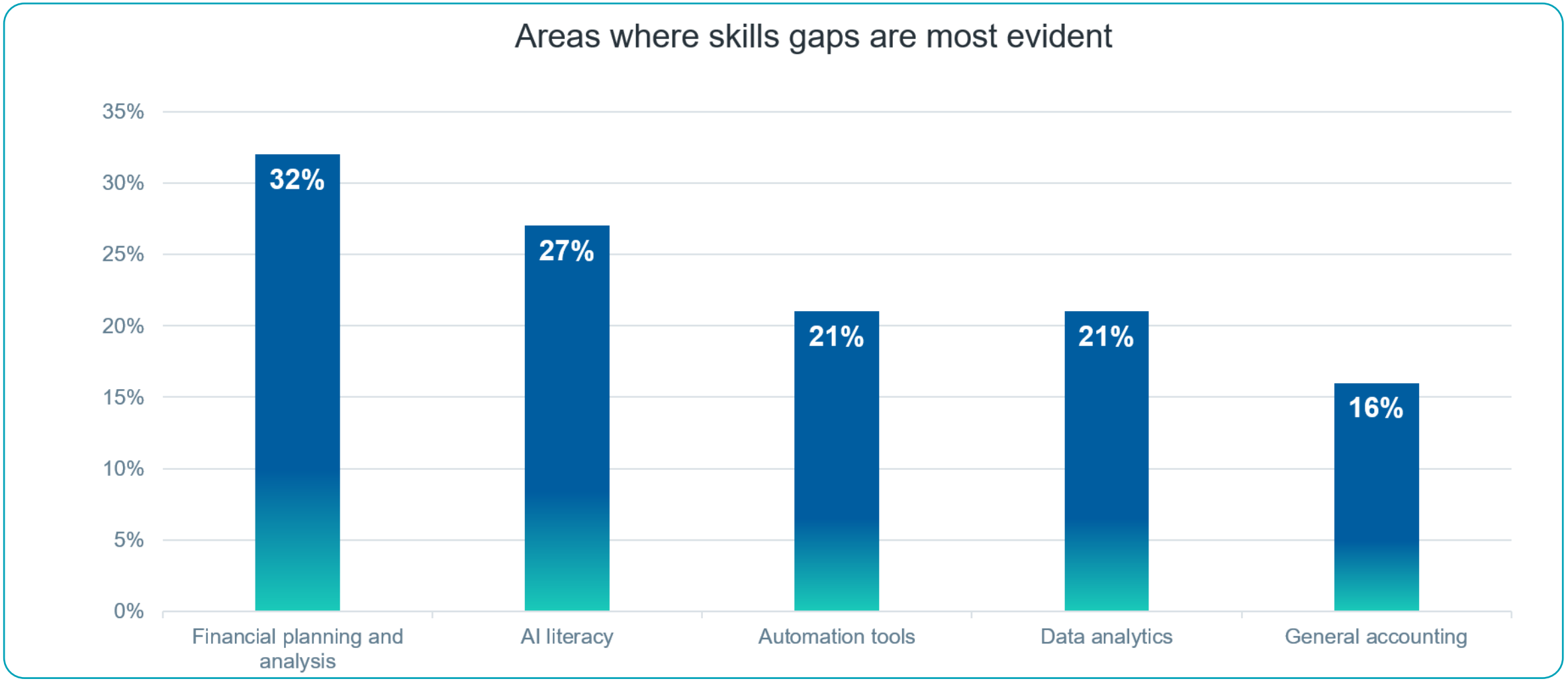
AI is gaining momentum, but proven technologies remain the primary drivers of efficiency and cost savings in finance.
Finance organizations are realizing the greatest benefits from investments in automation, advanced analytics, cloud solutions and technology rationalization. AI is becoming an important part of that ecosystem, but the strongest results still come from a broader modernization approach.

05

Global policy changes - economic, monetary, trade - are disrupting financial activities.
Changes in economic, monetary and trade policies are making forecasting and business planning more difficult. As a result, finance organizations are placing greater emphasis on cash management, scenario planning and maintaining flexibility in an unpredictable environment.



Where the Skills Gaps Are: FP&A, AI and More



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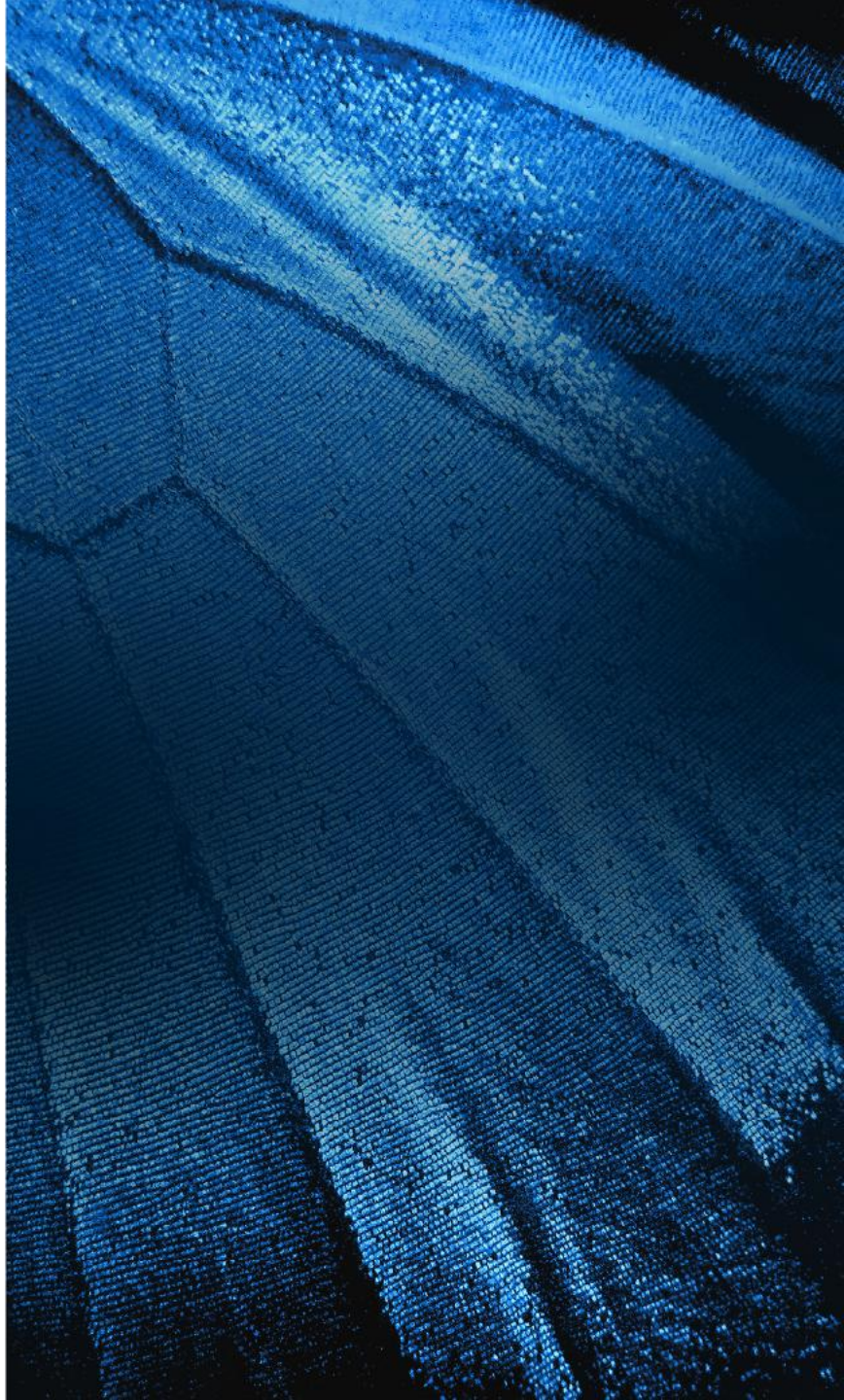
AI and Business Transformation

Polling Question #2

Is your finance organization employing AI (including generative and agentic)?

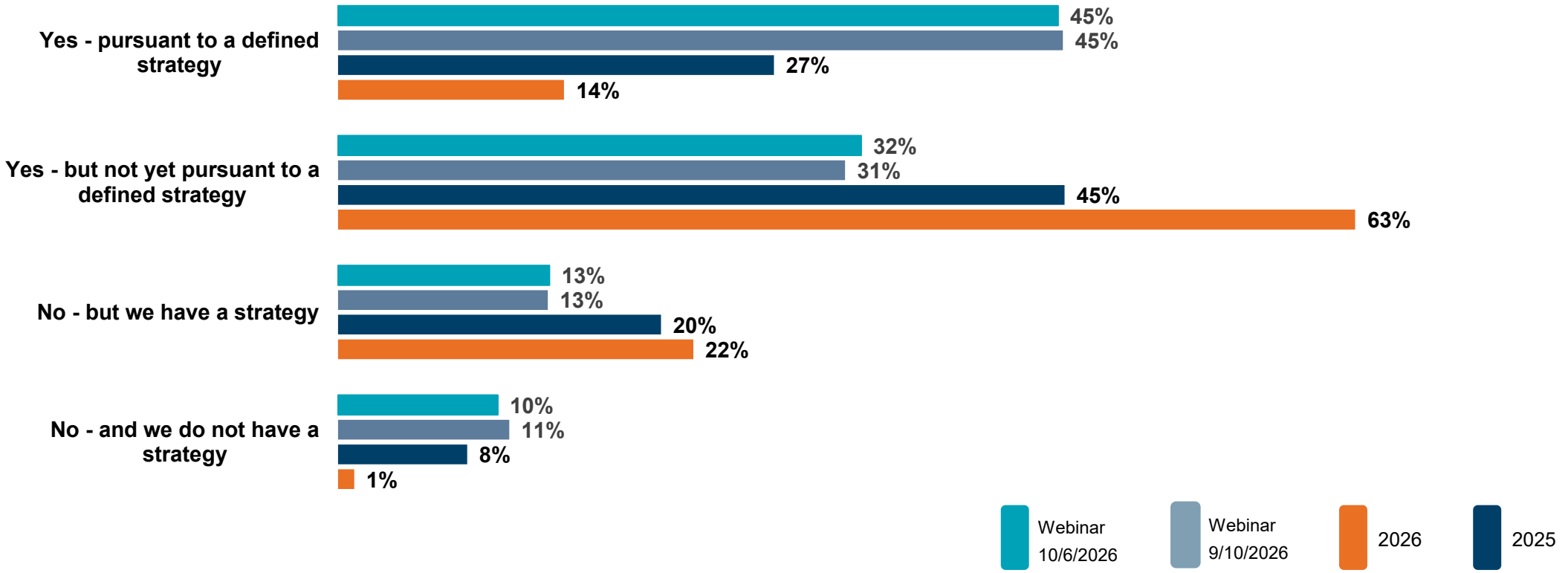
A. Yes – pursuant to a defined strategy
B. Yes – but not yet pursuant to a defined strategy
C. No – but we have a strategy
D. No – and we do not have a strategy



Organizations Employing AI (Including Generative & Agentic)

Question: Is your finance organization currently employing AI, including generative AI and/or agentic AI?

(Shown: All responses)



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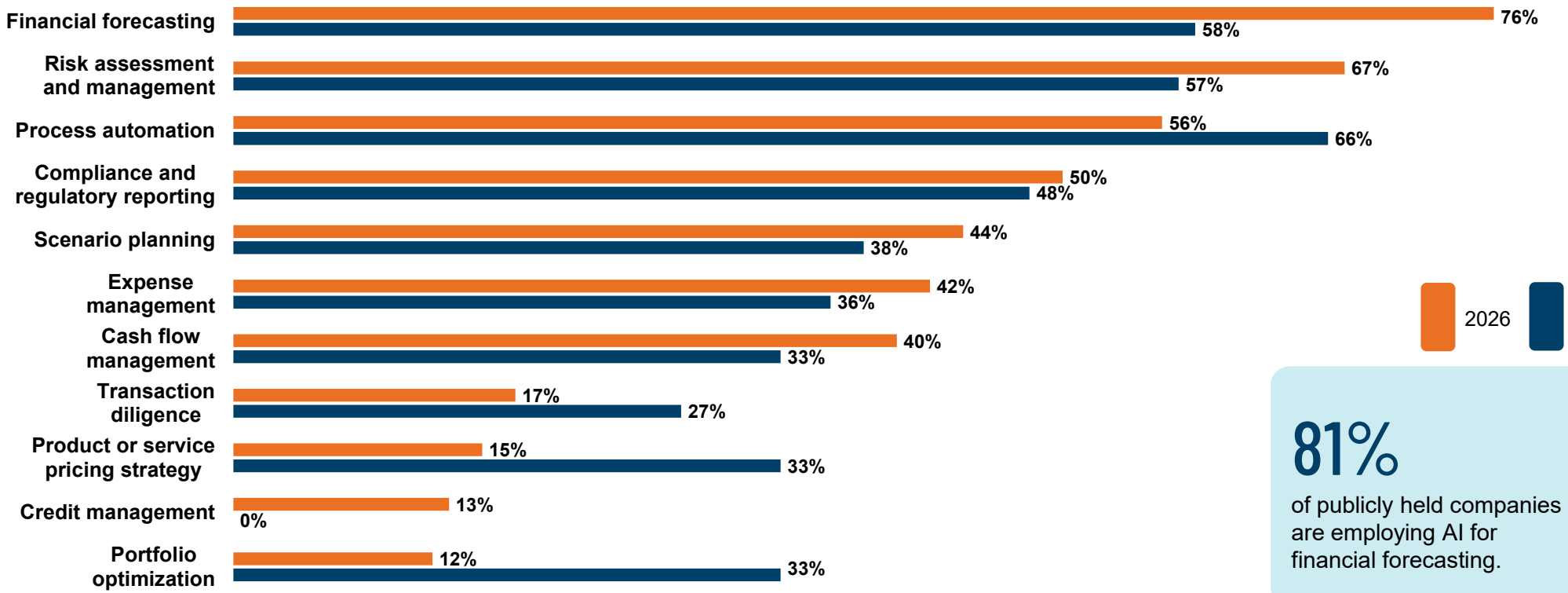
Activities Where Finance Organizations are Currently Employing AI

Question: Please indicate how your finance organization is currently employing AI (including generative AI and/or agentic AI). Select all that apply.

(Shown: All responses)



81%

of publicly held companies are employing AI for financial forecasting.

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Where Organizations are on the AI Maturity Continuum

Question: At which of the following stages do you believe your finance organization is on its AI journey?

(Shown: Among finance organizations employing AI)

Stage 1: Initial	Stage 2: Experimentation	Stage 3: Defined	Stage 4: Optimization	Stage 5: Transformation
8% | 12%	38% | 32%	42% | 39%	11% | 14%	1% | 3%
Finance organization recognizes AI's potential benefits but has limited understanding and no strategic initiatives. KPIs have not yet been defined.	Finance organization has initiated small-scale AI projects and pilots programs to assess feasibility and benefits.	Finance organization has integrated AI solutions into existing business processes, enhancing operational efficiency and decision-making.	Finance organization has optimized AI systems for performance and scalability, with continuous improvements based on data feedback.	AI drives significant business transformation in the finance organization.

62% of publicly held companies rate their maturity at the Defined or Optimization level, versus 42% of those in privately held companies

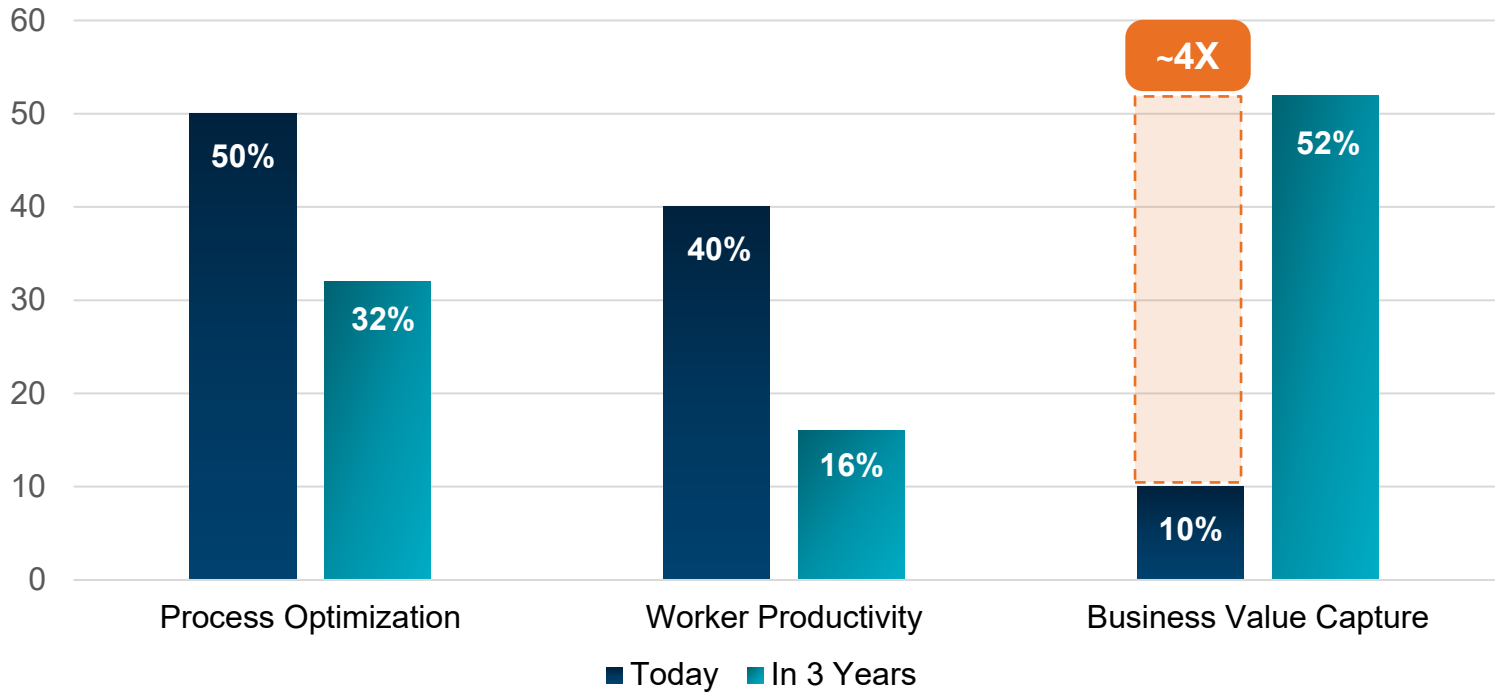
2026 Overall Responses

2025 Overall Responses

The Business Case Is Changing: From Efficiency Today to Value Tomorrow

Across nearly 800 executives, business value capture jumps from 10% to 52% as the primary driver of AI investment within three years, while process optimization and productivity fall by roughly half.

Which one of the following represents your primary driver for leveraging AI?



KEY TAKEAWAY

This is a decisive turn in why enterprises deploy AI. But ***value is captured through how work gets done, not through what gets deployed - which makes the workforce, not the technology, the next constraint on return.***

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Finance funds AI faster than HR says people are ready

Finance organizations are convinced of AI's value proposition and more confident in workforce readiness than HR organizations —so capital may be committed against a readiness the people function doesn't yet see, capping the returns finance expects.

Aligned on value

91%

of CFOs expect AI to improve bottom-line performance by 2030

Apart from HR on readiness

28%

of CFOs

vs

13%

of CHROs

strongly agree role designs are AI-ready

Funding ahead

64%

of CFOs expect a quarter or more of the finance function to be AI-enabled within 3 years



From insight to action

1. Gate AI funding on evidence that operational roles are AI-ready and validated with the CHRO.
2. Tie investment milestones to role redesign and reskilling, not just deployment.
3. Reconcile finance's readiness assumptions with HR before scaling spend.

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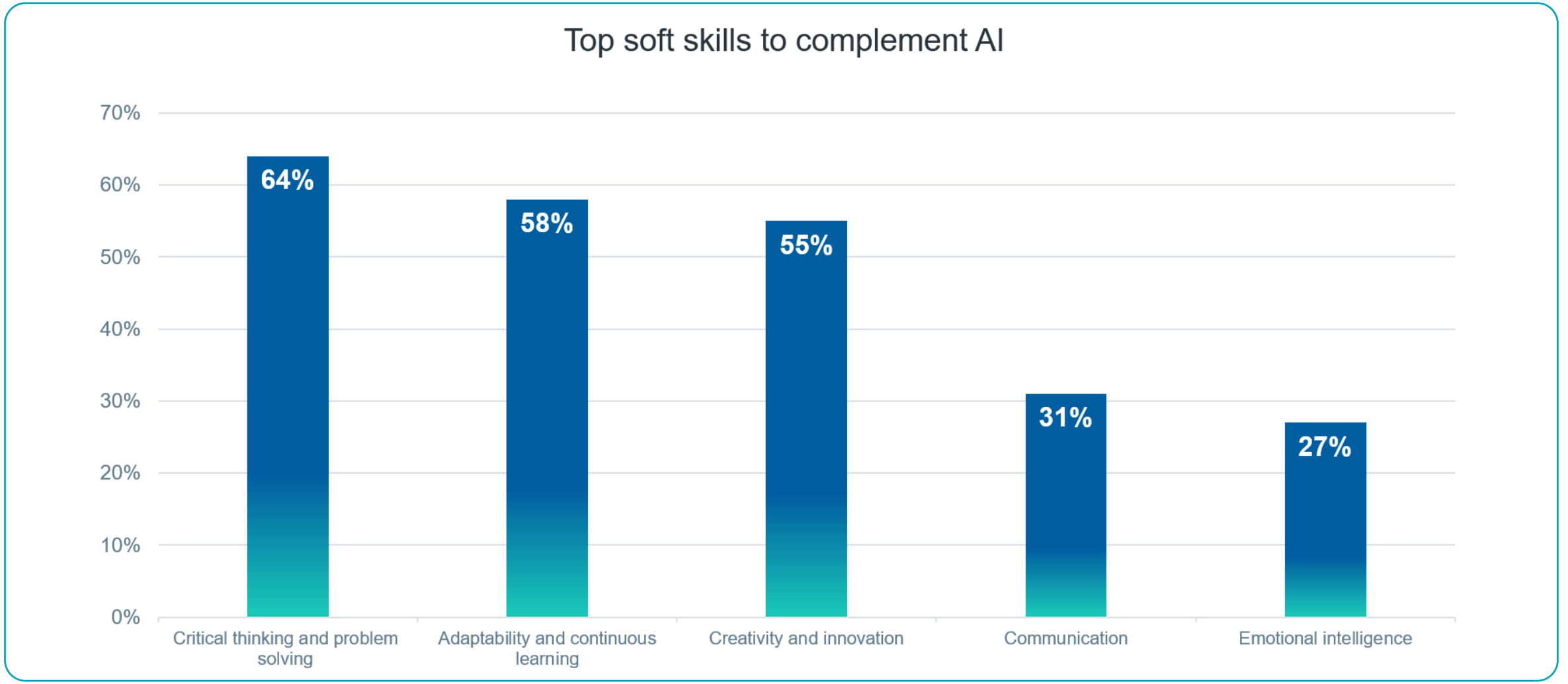
Human Skills in the AI Era



Balancing Hiring, Upskilling and AI in Finance

How strategies are evolving:

- 50% of managers are hiring for new skill sets.
- 43% have increased hiring.
- 39% are bringing in contractors or consultants.

Smart hiring factors in potential:

- Seek candidates with growth potential, not just “unicorns.”
- Upskill and reskill to help close gaps and support retention.



Upskilling delivers long-term value by:

- Filling skill gaps from within
- Lowering hiring and onboarding costs
- Boosting agility and competitiveness
- Improving engagement and retention
- Strengthening internal talent pipeline
- Accelerating tech adoption
- Preparing teams for future demands

AI Adding Complexity to Hiring

The evolution of technology is changing the labor market, and finance leaders face unique challenges navigating rapid change across finance and talent.



AI is making hiring hard

84% of finance leaders report encountering challenges with AI-generated resumes or application materials.



Skills harder to verify

65% of finance leaders say AI-driven applications make skills harder to verify



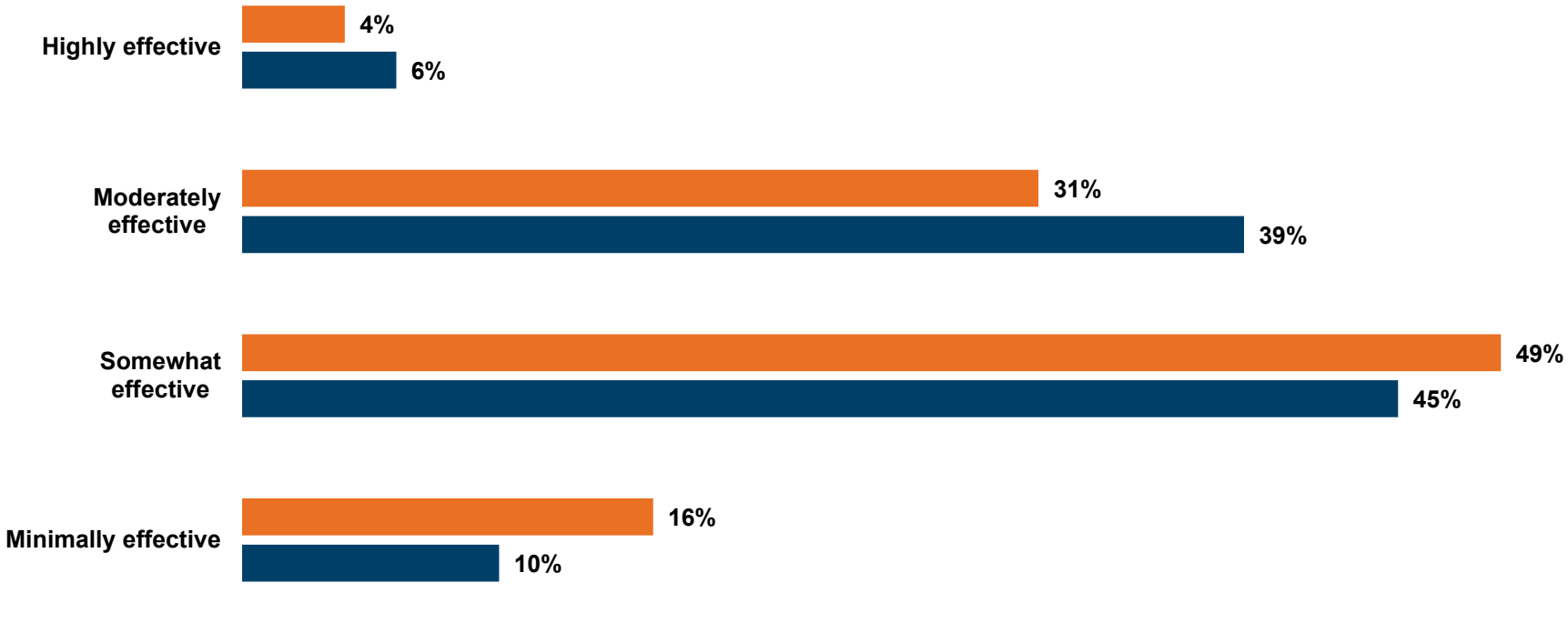
Slower hiring

61% of finance leaders say AI-generated applications are slowing hiring

Organizational Effectiveness in Measuring ROI on AI and Business Transformation Initiatives

Question: How would you rate the finance organization's current ability to measure returns on investments from AI technologies and Business Transformation Initiatives?

(Shown: All Responses)



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Maximizing ROI: Aligning AI Investments to Business Outcomes

Organizations are increasingly focused on the value generated from AI investments. However, the various AI investments are designed to achieve different outcomes, requiring different measures of success. Defining the intended benefits of each investment provides the foundation for measuring value and ROI.

Where AI is Generating Value

Workforce Productivity

AI enhances employee productivity and decision-making, improving **individual and team effectiveness**



Operational Excellence

AI improves business processes, workflows, and enterprise operations to increase **efficiency and effectiveness**



Customer Impact & Growth

AI enhances customer experiences, products, and **commercial outcomes**



Illustrative AI Benefits by Investment Type

- Hours saved
- Adoption rate
- Token efficiency

- Cost savings
- Cycle time reduction
- Quality / error reduction

- Revenue uplift
- Retention
- Customer satisfaction

Consider Foundational AI Readiness:

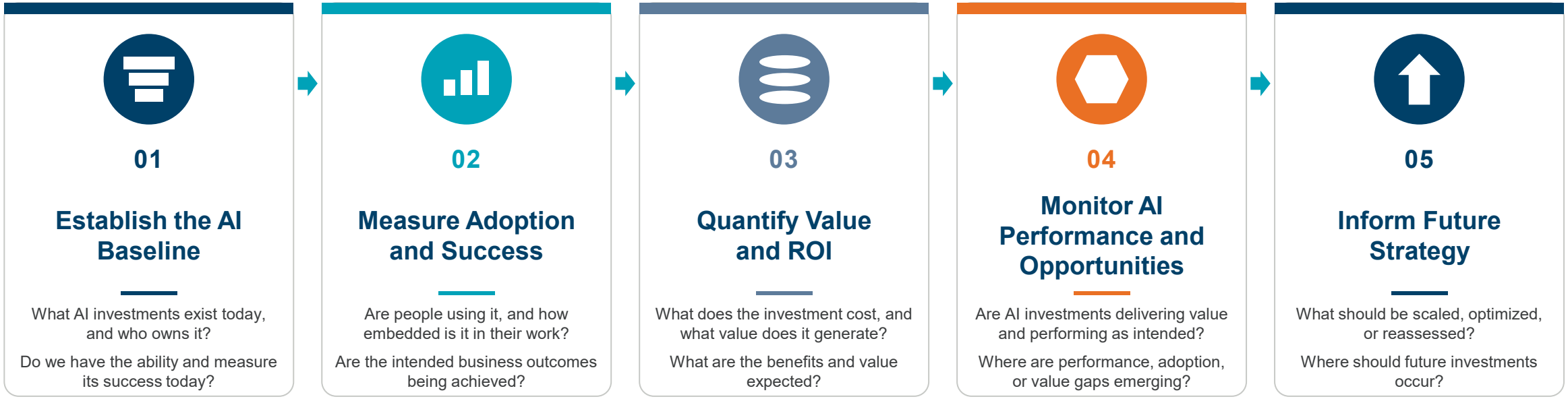
Organizations may realize lower value and greater risk when AI investments are scaled without foundational capabilities such as governance, security and risk management, data readiness, and change management.

Leaders are asking:

- Leaders are asking:
- Are AI investments tied to clear business outcomes?
- Which AI investments best align to our strategic priorities?
- Which use cases create value now vs longer-term strategic optionality?
- How should AI investments be governed, funded, and measured?
- What process redesign, training, incentives, and change management are required to capture value?
- What is the expected payback period by type of AI investment?

A Framework for Realizing and Managing AI Value

Our approach to define, measure, manage, and scale AI value — **a continuous lifecycle, not a one-time exercise.**



Organizations that realize sustained value from AI establish a repeatable process to understand current investments, quantify value, measure outcomes, govern performance, and inform future decisions.

Why Leadership Still Matters Most



Strategic



Transparent

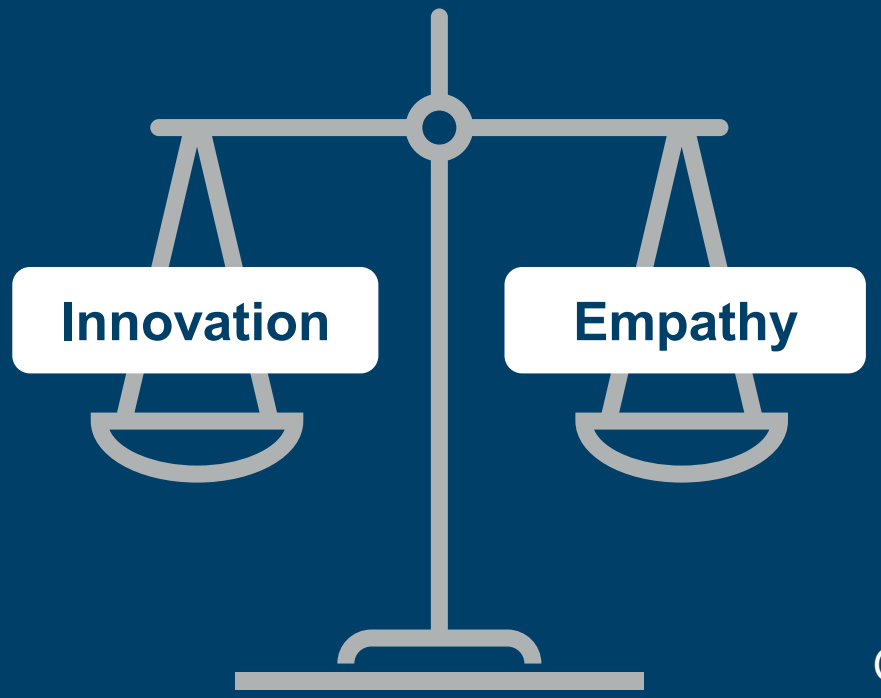


Proactive

Engaging Your Team and AI Responsibly

Hiring for new skill sets

Increased team productivity



More strategic work

Improved employee experience

AI has already replaced certain jobs

Contract talent or consultants to fill gaps

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AI People Enablement Checklist

Key people enablement considerations

Defining the Purpose & Application of AI

Enterprise-Wide Decisions

- Strategic business priorities and AI's role in achieving desired outcomes
- Identify key use cases, success metrics, value realization and required behavior change.
- Align on Leadership roles and responsibilities
- Develop AI governance model – including HR's role
- Determine approach / philosophy around communicating AI strategy to the workforce

Considerations: Pre-Implementation

- Change Enablement/ Adoption
- Job Redesign
- Cultural Impact
- Regulatory Monitoring
- Target Operating Model
- Workforce Planning
- Upskilling
- Employee Relations
- Agentic Tracking

Reality: Post-Implementation

Job Redesign & Modernization

- Job Descriptions
- Job Architecture & Pathing
- Compensation
- Functional Training

Change Enablement/ Adoption

- AI Adoption Sustaining Approach
- New Hires/Onboarding
- Ethics Training

Governance

- Process for tracking state laws on how AI can be used

Functional Organization Design

- HR, IT, Finance, etc.

Reporting & HR Controls

- Report Management
- Risk Management regarding new and old technology

Employee Relations

- Strategy Implementation
- Policies & Disclaimers

Downstream Impacts

- Retrofit the HR Function
- Continuous Monitoring of Skills & Roles
- Create Enhanced Employee Listening Strategies
- Re-imagine the role of Early Career Professionals
- Speed of Upskilling as a competitive differentiator

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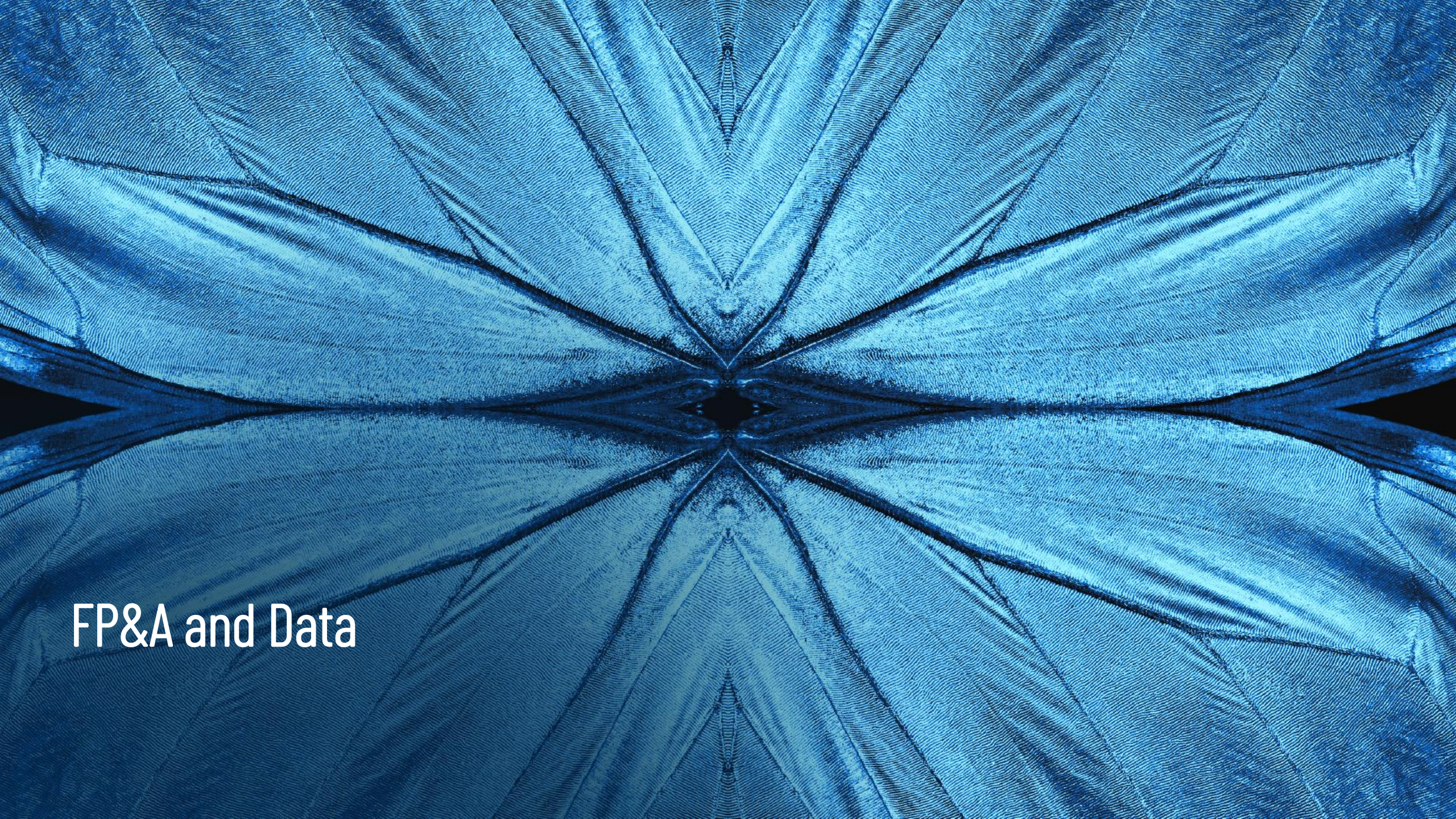
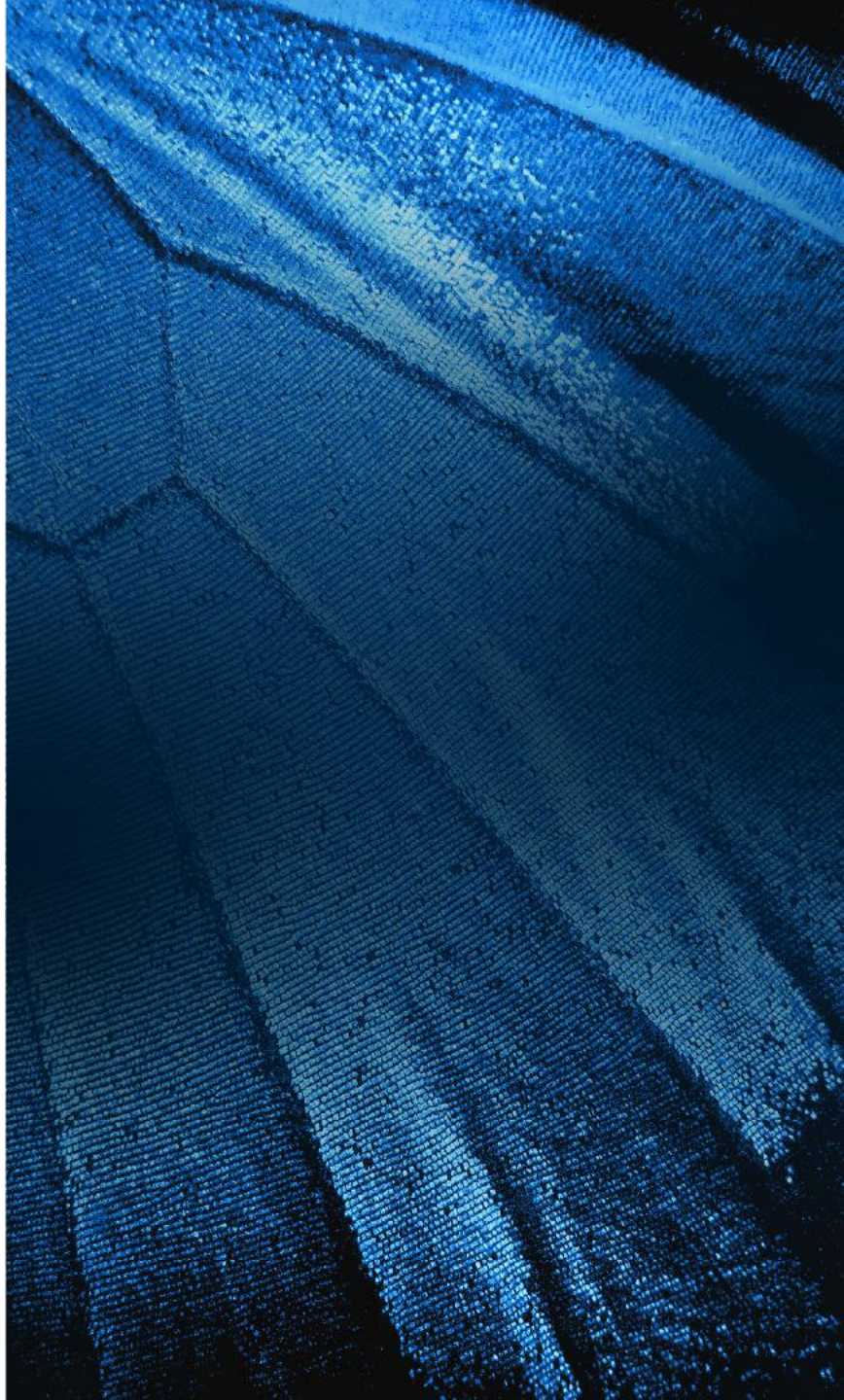

FP&A and Data

Polling Question #3

How confident are you in your organization's ability to navigate the current challenges and uncertainties in the economy?

1. **Somewhat confident**
2. **Very confident**
3. **Neutral**
4. **Somewhat unconfident**

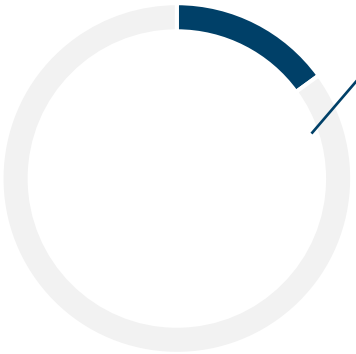


By the Numbers: Impact of Economic, Monetary and Trade Policies



80%

believe the finance organization's ability to prepare reliable financial reporting and forecasting under required timelines has been ***at least moderately*** impacted by changes to economic, monetary and trade policies.



15%

are **very confident** in their organization's ability to navigate current challenges.



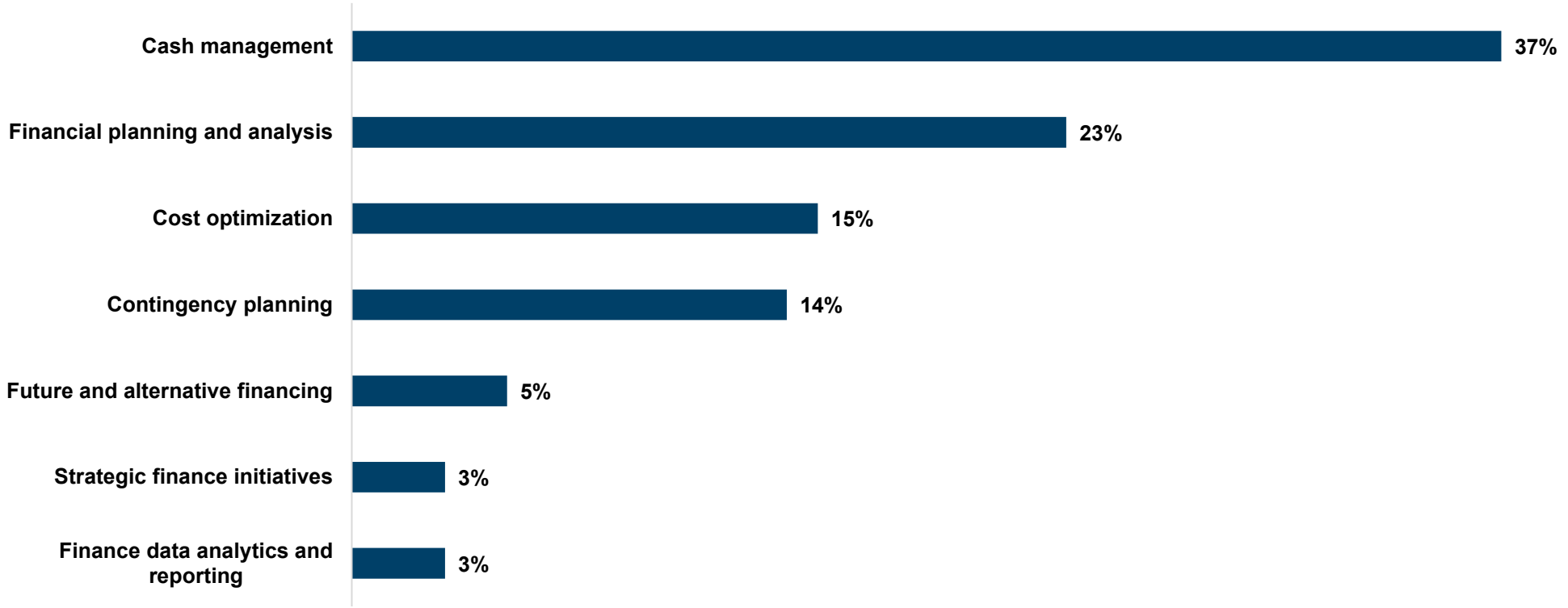
76%

report that the organization's profitability and ability to source goods sufficiently from its supply chain has been ***at least moderately*** impacted by changes to economic, monetary and trade policies .

Areas Most Affected by Economic, Monetary and Trade Policy Changes

Question: Within your finance and accounting function, which of the following activities/areas have required the most attention in the past 3 months due to the impact of ongoing changes to economic, monetary and trade policies?

(Shown: Percentage of areas ranked first)



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Why Volatility Is Elevating Finance Priorities

Volatility is exposing a gap between the speed of change and organizations' ability to respond.

Changing Environment



Trade & tariff uncertainty is reshaping sourcing economics



Input cost volatility is increasing margin pressure



Customer demand is becoming harder to predict



Supply-chain disruption continues to affect inventory and working capital



Leadership expects faster decisions amid greater uncertainty

Business assumptions are changing faster than ever before.

The Central Challenge

The Agility Gap

Many organizations struggle to:

- Identify when changing conditions become financially material
- Understand where profitability, cash, and working capital are exposed
- Quantify the impact on revenue, margin, and liquidity
- Evaluate risks, opportunities, and alternative outcomes with confidence
- Respond before management options narrow

Areas of Increased Focus

Financial Planning & Analysis

Improve visibility into where performance is heading

Profitability Analysis

Understand where margin, cash, and value are at risk

Enhanced Data Analytics

Translate changing drivers into management choices

Volatility is increasing the importance of planning, profitability insight, and analytics because these capabilities help organizations recognize change, understand exposure, evaluate choices, and respond with greater agility.

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Analytics Turns Changing Conditions into Better Decisions

The most valuable analytics reduce the time between a changing business condition and a management decision.

Detect Changing Drivers

What's changing?

- Demand & customer behavior
- Pricing & margin drivers
- Cost & labor assumptions
- Supply & sourcing conditions

Ex: Tariff-driven cost increases • Labor availability & wage inflation • Demand shifts across customer segments

Outcome
Recognize change before it is fully reflected in reported results



Translate Financial Implications

What does it mean?

- Connect drivers to revenue, margin, cash, and working capital
- Improve visibility across products, customers, regions, channels, and SKUs
- Understand where value is being created, protected, or eroded

Ex: Product margin compression • Customer profitability shifts • Working-capital & inventory exposure

Outcome
Understand where the organization is exposed



Evaluate Management Choices

What should we do?

- Assess alternative outcomes
- Evaluate risks, opportunities, and likely outcomes
- Compare the implications of different actions and inaction

Ex: Pricing actions • Sourcing alternatives • Cost reduction vs. growth investment tradeoffs

Outcome
Improve decision quality while options still exist



Advanced analytics creates resilience by helping organizations identify change earlier, understand exposure faster, and make more informed decisions while options remain available.

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The Value of Specialized Skills

ACCOUNTING

- Controllership
- Month-end close acceleration
- Regulatory reporting
- Technical accounting

FINANCE

- Data and business analytics
- Data readiness and fluency
- Forecasting
- Power BI and Tableau

Dynamic Planning Is More Than Forecasting More Often

Organizations can update forecasts more frequently and still respond slowly if assumptions, decisions, and functional plans remain disconnected.

TRADITIONAL APPROACH	LEADING PRACTICE
Annual Budget Annual planning cycle drives decisions	**Rolling Outlooks** • Refresh outlooks as conditions evolve • Focus updates on changed drivers and decisions
Fixed Assumptions Assumptions revisited periodically	**Active Assumption Management** • Monitor critical assumptions continuously • Escalate changes when financially material
Single-Point Forecast Focus on the most likely outcome	**Decision-Oriented Scenarios** • Evaluate multiple plausible outcomes • Connect scenarios to management actions
Functional Planning Silos Commercial, supply chain, operations, and finance plans developed independently	**Integrated Business Planning** • Align demand, supply, operational, and financial plans • Improve visibility into margin, inventory, working capital, and cash

Dynamic planning is not a faster Finance cycle. It is a connected management process for reassessing assumptions, aligning plans, and evaluating choices as conditions change.

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The Goal Is Decision Readiness

Dynamic planning prepares the organization to make informed decisions as conditions change, not simply produce more forecasts or scenarios.

01	02	03	04	05	06
Recognize Change	**Test Assumptions**	**Understand Exposure**	**Evaluate Scenarios**	**Assess Choices**	**Act Decisively**
What has changed?	**What no longer holds?**	**What is at risk?**	**What could happen?**	**What can we do?**	**When do we move?**
Market, policy, customer, supply chain, cost, or operational change	Identify the assumptions the change puts in question	Revenue | Margin | Cash | Working Capital | Capital	Weigh credible outcomes and their consequences	Pricing, sourcing, inventory, investment, financing, and cost levers	Act while practical options remain available

Awareness ≠ Readiness

Awareness is knowing a risk exists. Readiness is understanding the exposure, evaluating the options, and knowing when to act.

In volatile environments, resilient Finance organizations connect forward-looking planning, profitability insight, and advanced analytics to recognize change, understand exposure, evaluate choices, and act before circumstances dictate the response.

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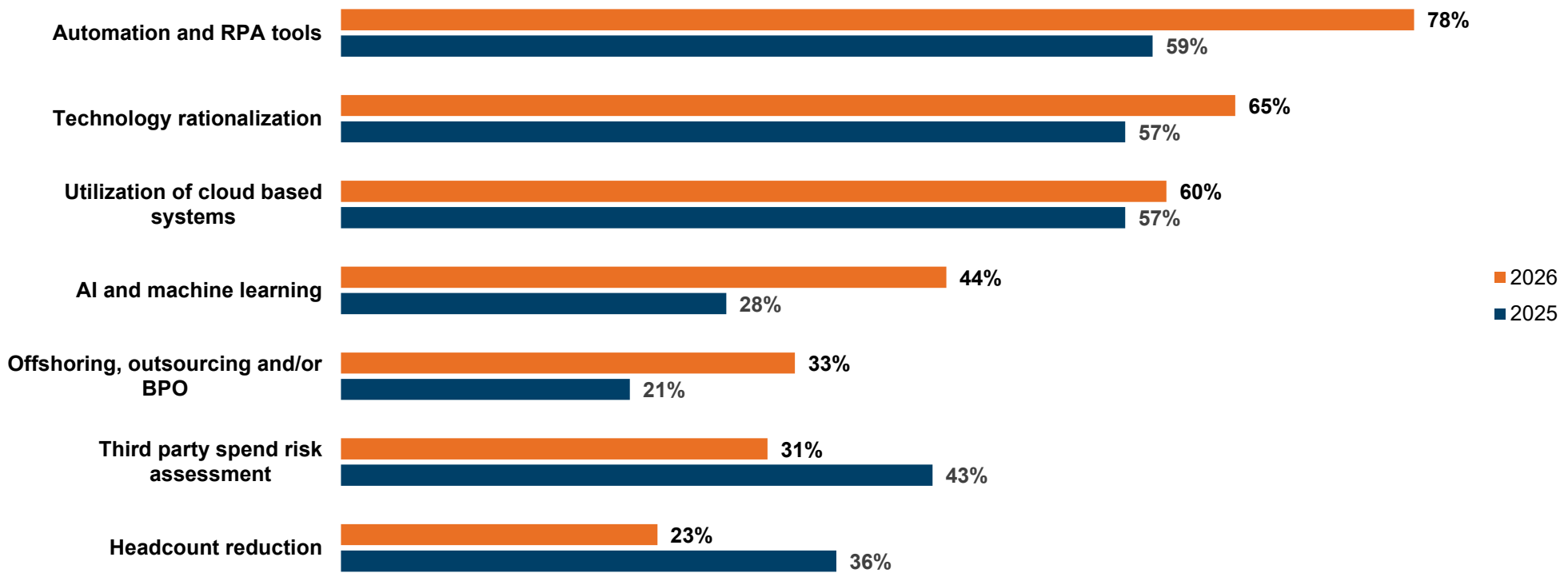
Areas Where Cost Optimization Has Been Achieved in the Last Year

Question: Thinking about your cost optimization efforts, in which of the following areas have you achieved meaningful, measurable progress over the past year? (Select all that apply.)

(Shown: Multiple answers permitted)



Not shown: "Other" and "Don't know responses.

Trusted Data is the Foundation for Better Decisions & Scalable AI

Proven technologies are delivering measurable gains today. AI creates more value when it operates above governed, verified calculations and KPIs.

Three practices create decision-grade finance information

01
Govern around decisions
Start with critical finance outcomes — revenue, margin, cash and working capital — then govern the KPIs, dimensions and source data required to manage them.

02
Build once, use many times
Standardize metric definitions and financial logic in a governed information layer serving reporting, FP&A, profitability analysis and AI.

03
Automate trust
Move quality checks, reconciliations and exception detection upstream so finance spends less time finding data problems and more time acting on exceptions.

Target architecture principle

AI, Forecasting, Scenario Analysis, & Decision Support



Trusted Finance Information Layer

certified KPIs • authoritative definitions • lineage • controls • ownership • data-quality tolerances

AI should sit above trusted finance logic — not replace it.

Govern what matters. Define it once. Trust it everywhere.

Do not skip the proven foundations in the rush to AI

Cost-optimization progress achieved over the past year

78% Automation & RPA tools

65% Technology rationalization

60% Cloud-based systems

44% AI & machine learning

CFO Takeaways

AI makes the data foundation more important, not less important. It needs authoritative definitions, lineage, controls and accountability underneath the model.
Use automation, rationalization and cloud capabilities to create trusted data — then scale AI on verified calculations, KPIs and controls.

From Reporting the Past to Detecting Change

Integrated data, analytics and automation help finance identify emerging risks before they appear in reported results.

79% Report at least a moderate impact on reliable financial reports and forecasts from economic, monetary and trade-policy changes

83% Rank cash management among the top three areas requiring attention amid current market volatility

01 Critical Assumptions
What must remain true for the plan to hold?

02 Leading Signals
What would change before the financial outcome?

03 Signal Validation
Is the change persistent, unusual and material?

04 Financial Exposure
What outcome is at risk?

05 Decision Trigger
When do we escalate or refresh scenario?

06 ACTION
What lever can management pull?

From Trusted Data to Early Detection

Use the trusted finance information layer to continuously monitor, interpret, and route material signals

TRUSTED INFORMATION

Certified KPIs and calculations

Finance + operational + external drivers

Common definitions, lineage and controls

Same governed finance layer from the prior slide

CONTINUOUS MONITORING

Scheduled or event-driven refresh

Automated reconciliations and quality checks

Threshold and tolerance monitoring

Trend and velocity analysis

INTELLIGENT DETECTION

Anomaly and pattern detection

Multi-signal correlation

Predictive model / forecast comparison

AI-assisted root cause and impact analysis

WORKFLOW & ACTION

Quantify revenue, margin, cash or liquidity exposure

Trigger alerts and escalation based on agreed tolerances

Refresh scenario / forecast and track response

The value is decision latency: how much earlier finance can detect exposure while management still has practical options.

Early warning is a decision mechanism

A KPI turning red is not enough.

Signal
+ Financial consequence
+ Threshold
+ Owner
+ Predetermined action
= Early warning

Start Small

1 material outcome
→ 3 to 5 assumptions
→ leading indicators
→ tolerances
→ owner and action

Prove the signals provide useful lead time before expanding the capability.

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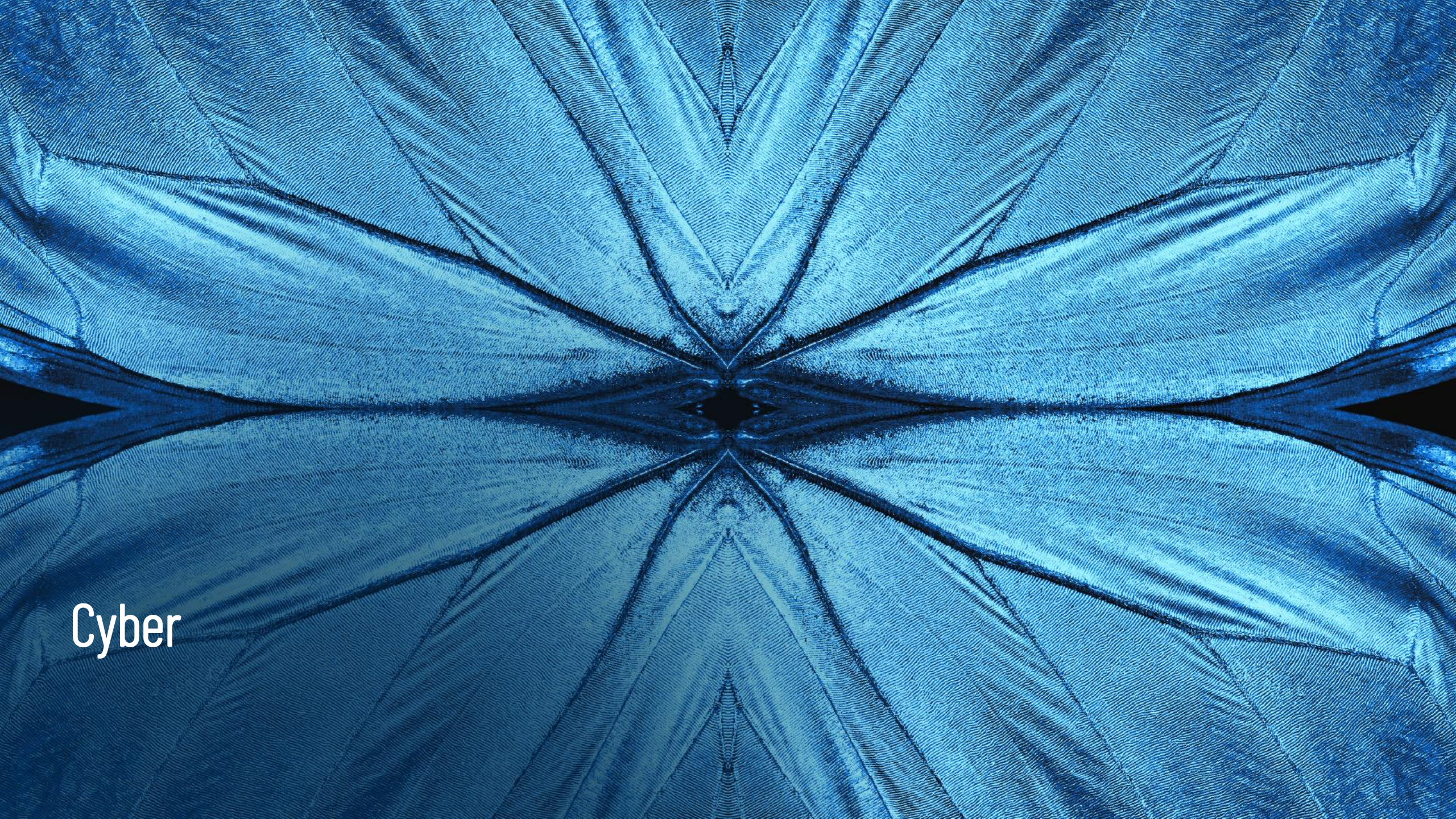
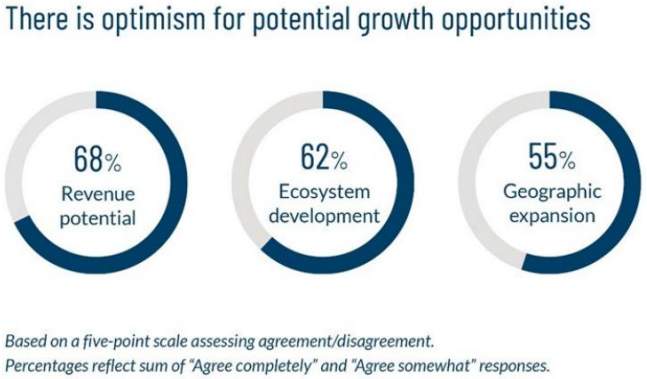

Cyber

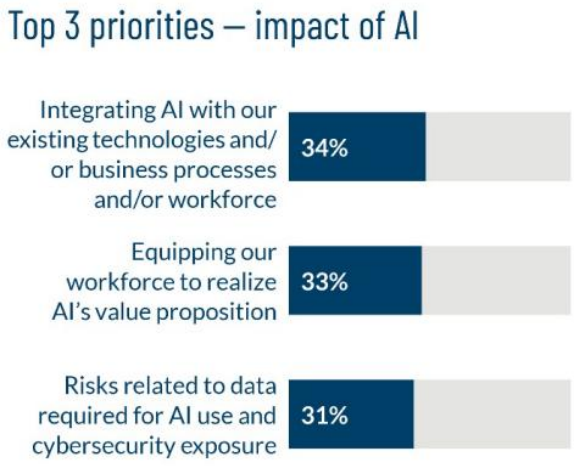
UNLOCKING OPPORTUNITY

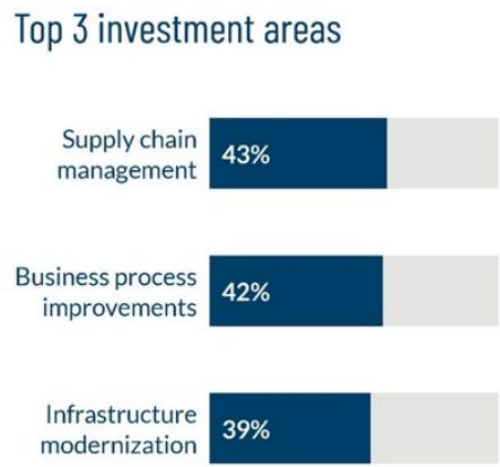
CFO 2026 Top Risks for the Near-Term

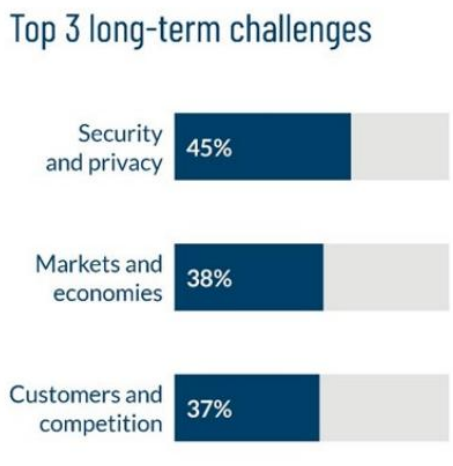
The key findings in this report enable board members and senior executives to benchmark their organization's opportunities and risks against their peers. The biggest risk organizations face today is doing nothing.

RISK DESCRIPTION	2026 Rank	2025 Rank
Changes in global markets and trade policies	**1**	5
Cyber threats	**2**	7
Increases in labor costs	**3**	4
Third-party risks	**4**	15
Economic conditions, including inflationary pressures	**5**	1









*Based on insights from the 2026 Executive Perspectives on Top Risks and Opportunities conducted by North Carolina State University's ERM Initiative and Protiviti.

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Cybersecurity – Not Just a Technology Issue

Cybersecurity is no longer just a technology issue; it is a critical business and financial risk. Cyber threats are increasingly becoming financial risks driving earnings volatility, capital allocation, and board scrutiny. Finance leaders must reassess whether current cybersecurity investments, operating models, and risk quantification approaches are sufficient to protect enterprise value while avoiding inefficient spend.

Reassess investment mix and ROI discipline:

- Re-prioritize funding toward capabilities that reduce time-to-triage, time-to-patch, and blast radius, rather than expanding overlapping tools.
- Tie cyber investments to measurable outcomes such as reduced incident likelihood, faster recovery, and improved resilience—all translatable to financial impact.



Strengthen board communication and risk quantification:

- Translate cyber exposure into dollar-based risk metrics to enable “apples-to-apples” investment decisions at the board level.
- Partner with CISOs and CROs to quantify how accelerated exploit timelines affect loss expectancy, insurance posture, and volatility.
- Use risk quantification to support capital allocation decisions and demonstrate discipline as cybersecurity costs continue to rise.



Reinforce third-party financial risk oversight:

- Elevate third-party cyber risk as a material financial dependency, focusing on concentration risk, contractual response obligations, and downstream business impact.
- Align vendor risk expectations with faster disclosure, patching, and escalation requirements consistent with “hours-to-exploit” realities.



Securing AI

A strong target operating model and governance framework provide the foundation for a responsible AI strategy. Finance leaders must be aware of ever-changing and emerging rules and regulations for industries and geographic regions as a requirement when adopting AI. AI accelerates finance, but accuracy comes from the human-in-the-loop validating the data and decisions. Whether managing cyber security risk or anticipating regulatory changes, Protiviti walks alongside clients to ensure AI solutions are responsibly implemented and maintained.

	Cyber Security & Threat Protection	Governance & Ethical Controls	Data Quality & Integrity
Opportunity	**CFOs are increasingly responsible for technology risk, especially when AI is embedded in financial operations.**	**CFOs require clear governance, documented decision logic, and assurance that AI aligns with regulatory expectations.**	**CFOs depend on accuracy in reconciliations, financial statements, and forecasts, making data integrity essential for effective AI adoption.**
Approach	• Educate and train users on safe AI practices and usages. • Maintain comprehensive logs for accountability and incident review. • Use robust frameworks (e.g., LangChain, CrewAI, AutoGen) for building and managing agents.	• Document AI policies and procedures. • Establish ethical guidelines and identify key legal, regulatory, and compliance requirements. • Evaluate use cases with risk rating schemas and establish guardrails.	• Prioritize integration with existing enterprise systems and data platforms. • Keep models current and adaptive through on-going updates • Train users on verification best practices, and ways to spot model hallucinations.
Value	• Reduce financial and operational exposure from cyber events. • Protect sensitive financial data used in forecasting, reporting, and treasury processes. • Promote cross-functional collaboration.	• Minimize audit, regulatory, and reputational risk through proactive governance. • Document explainable AI decisioning to defend strategy to auditors, regulators, and the board.	• Prioritize accurate, audit-ready outputs from AI systems. • Reduce rework, errors, and reliance on manual controls. • Build trust in AI-powered processes.

AI Rules & Regulations

In an AI-driven world, the CFO, CIO, and CISO can no longer operate in separate lanes. Finance is increasingly at the center of enterprise data, and that data is becoming the fuel for AI-driven transformation. The opportunity to transform Finance is significant, but so is the responsibility to protect the data behind it. The strongest organizations will align Finance Transformation, technology, and cybersecurity from the start—because you cannot fully unlock the value of AI without first establishing trust in the data.

Key action items

1 **Focus transformation on the priorities that matter most**
Direct resources toward finance challenges that can improve resilience, decision-making and measurable business performance.

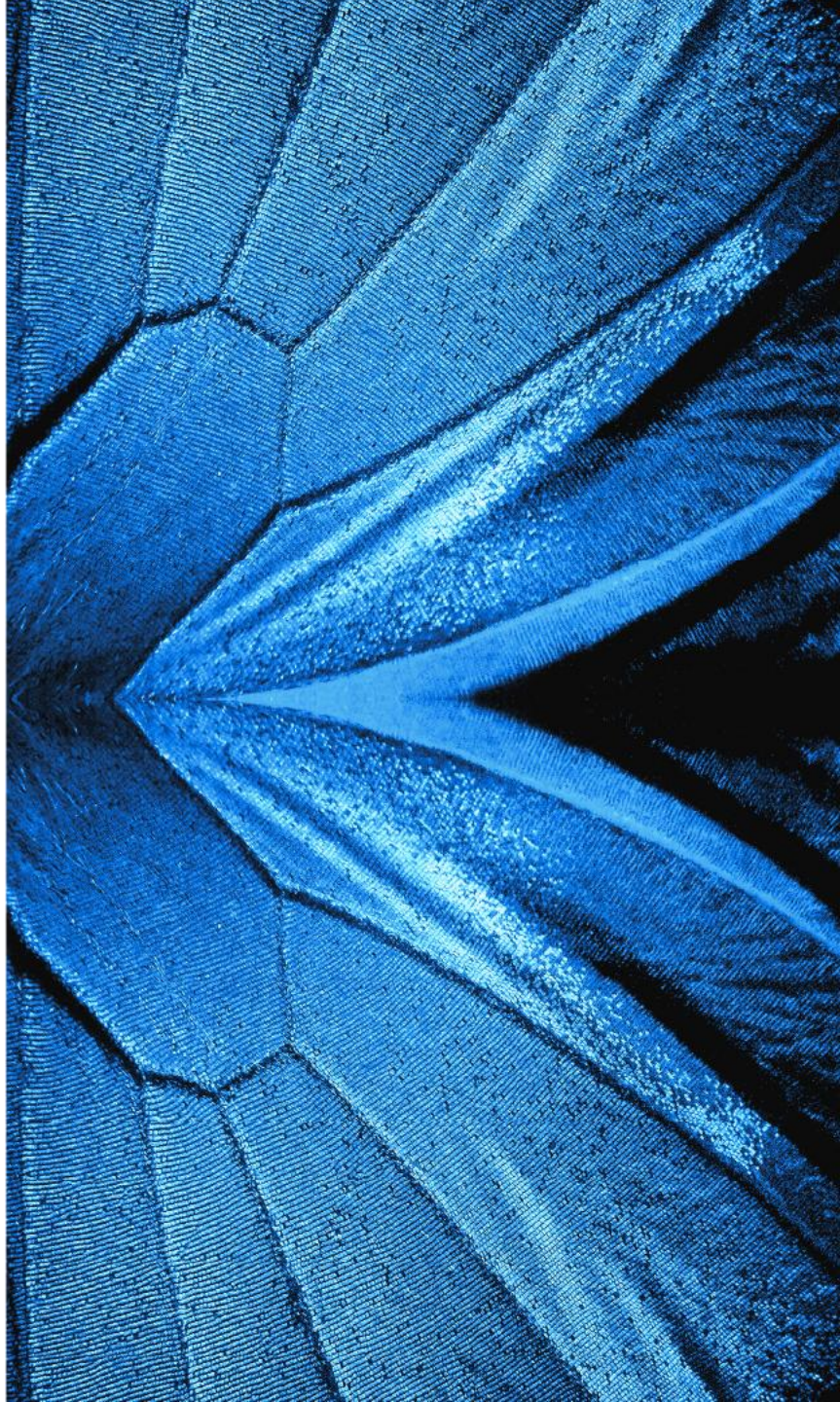
2 **Select AI use cases with value and readiness in mind**
Prioritize initiatives based on business outcomes, data maturity, risk, adoption requirements and the ability to measure ROI.

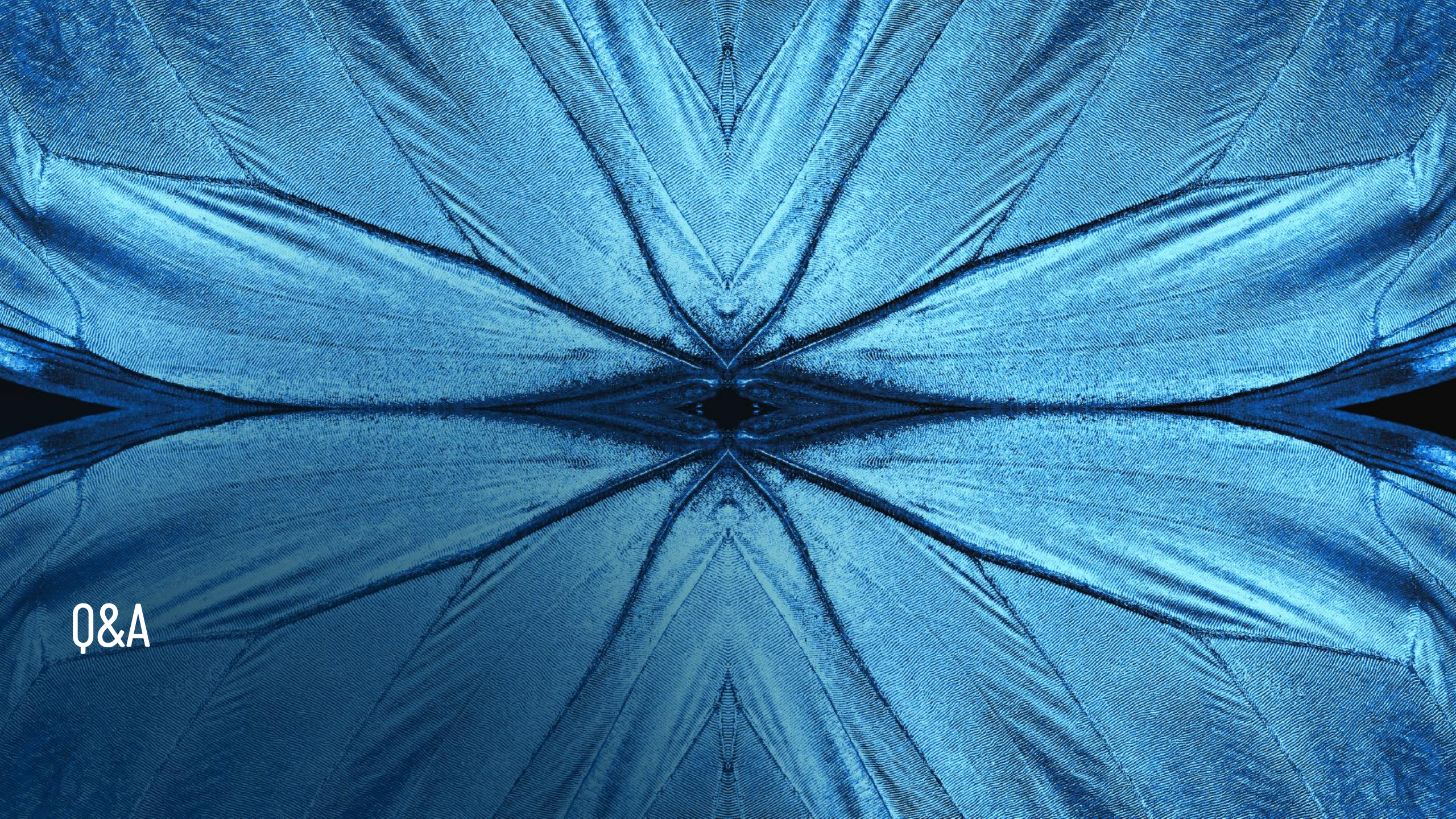
3 **Build the talent, skills and leadership capacity to execute**
Upskill current teams, hire strategically and use specialized or flexible talent to increase agility, support adoption and enable growth

4 **Strengthen FP&A, analytics and dynamic planning**
Connect changing business drivers to forecasts, profitability, scenarios and management choices.

5 **Scale through trusted data, governance and controls**
Standardize critical finance logic, strengthen data quality and embed privacy, security and human oversight.

6 **Lead change and turn insight into earlier action**
Communicate clearly, establish ownership and define leading indicators, thresholds and response plans so teams can act while options remain available.




Q&A

Recommended Resources

2026 Global Finance Trends

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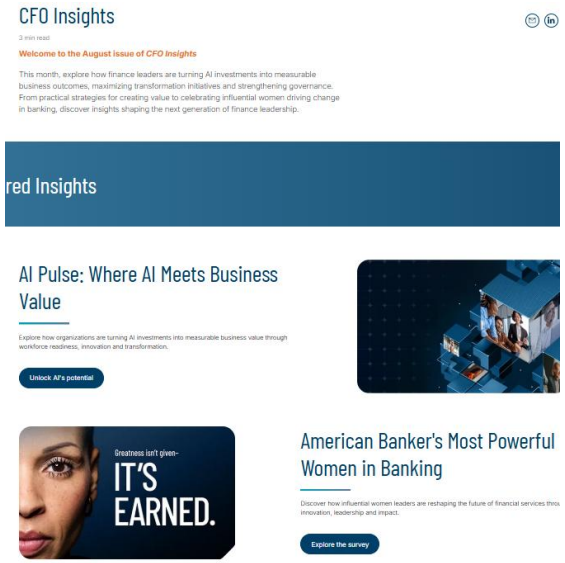

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