



Unlock AI to Shape Your Firm of the Future

Industry Webinar Series: Building the Firm of the Future

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September 12, 1pm Eastern

How Maxwell Locke & Ritter Grew its Security & Compliance Practice by 5X

Kate Williams, Risk Assurance & Advisory Partner, ML&R

October 5, 1pm Eastern

Drive Digital Transformation with PCI and HITRUST Engagements

Shane Peden, Managing Director, Aprio

October 27, 1pm Eastern

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Mark Koziel, President & CEO, Allinial Global

November 9, 1pm Eastern

How Mazars Is Innovating and Transforming the Client Experience

Darin McLaury, Director

Webinar Logistics

- All attendees will be placed on mute to minimize background noise
- Webinar will be recorded & shared along with the presentation slides
- We encourage active participation through the Q&A panel
- Help us learn more about you by answer polling questions
- How did we do? Answer a 5 question survey post webinar before you leave

Thank you!

Today's Speakers



Mark Koziel

**President and CEO
Allinial Global**

- . EVP Firm Services at AICPA and other executive roles
- . Accounting Today's Top 100 Most Influential People in Accounting
- . International Accounting Bulletin's Global Accounting Power 50 List



Jin Chang

**CEO and Co-Founder
Fieldguide**

- . Expertise in audit and advisory, artificial intelligence, technology
- . Experience at EY, Atrium, Y Combinator



Josh Tong

**Head of Product
Fieldguide**

- . Led product management at SourceDay, Shelfbucks, and other technology leaders
- . Expertise in data science and analytics

AI and the Advisory & Audit Industry

77%

Feel AI will have significant firm impact

92%

Moderate to high-level concerns

\$4B

Big 4 investment in AI over next 3 years

30%

AI growth in Accounting industry

Question #1

What are some of the major AI themes that you hear about when you meet with firm CEOs and Managing Partners?

Question #2

More than 300,000 accountants and auditors have left their jobs, a 17% decline. How do you see AI helping address the industry's talent shortage challenges?

Question #3

How does AI play a role with offshore resources?

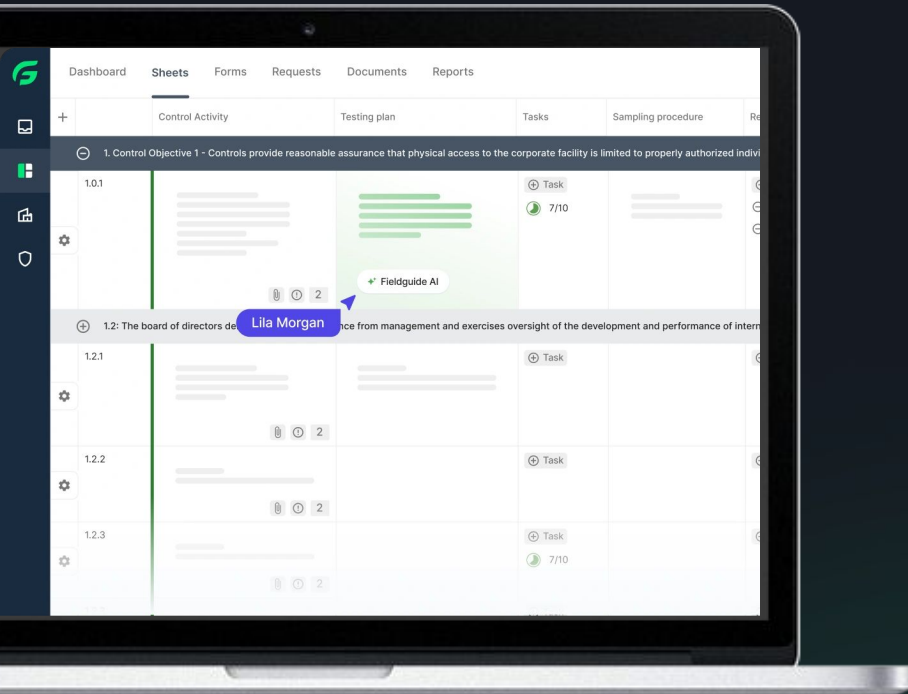
Question #4

What are the top 3 challenges you've seen with firms trying to adopt AI, and how are firms working through those challenges?

Question #5

What AI technologies have you seen firms use today, and what are the key use cases for them?

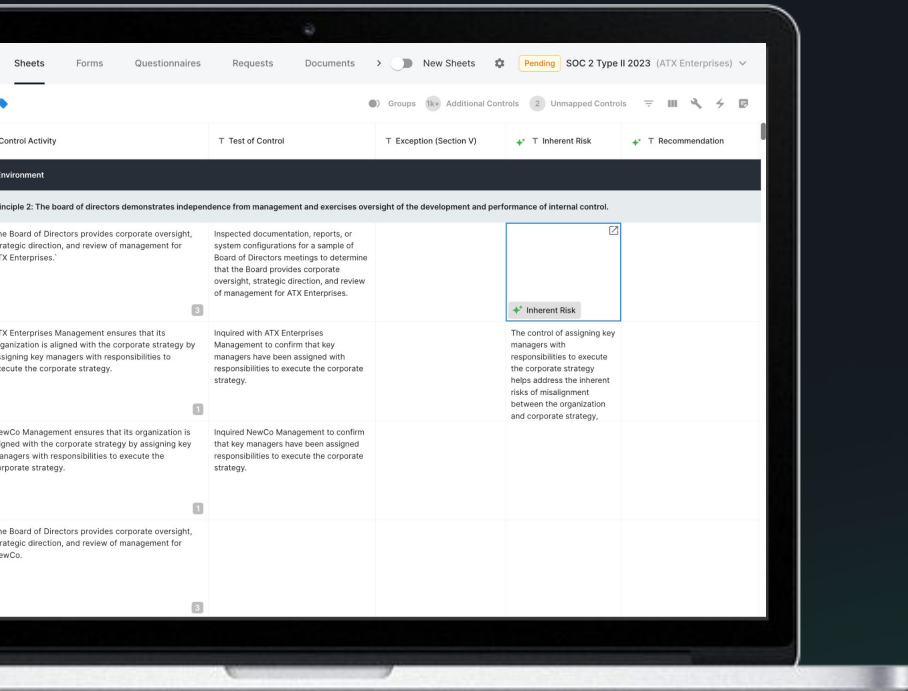
Question 5 Follow-Up



Challenge: Onboarding new clients requires staff to draft new test procedures and request lists – generally a 10-12 hour task.

AI Use Case: Teams can use AI to draft tests and requests, to efficiently create test procedures and request lists in $\frac{1}{3}$ of the time.

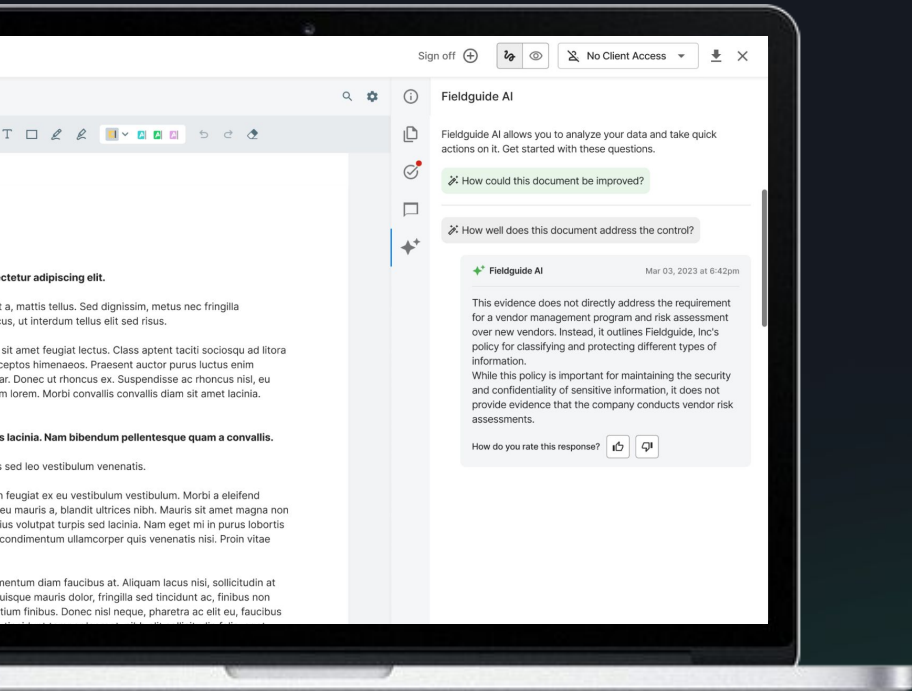
Question 5 Follow-Up



Challenge: Quality leaders wanted inherent risks written out for each control, but practice leaders didn't have budget.

AI Use Case: The team used AI to assist with inherent risk drafting for each control. This allowed the team to keep high quality standards, while remaining on budget.

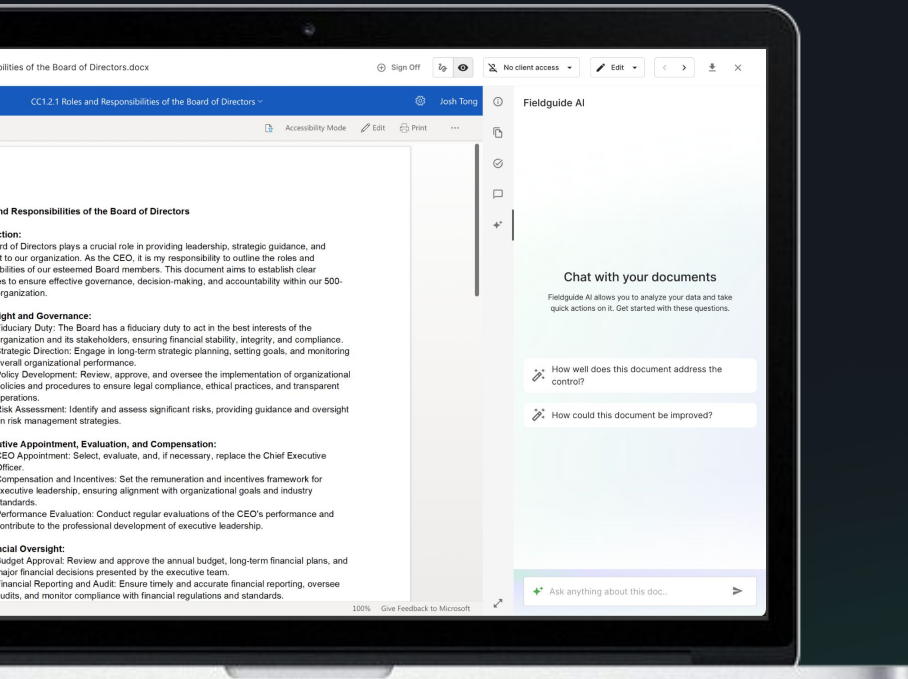
Question 5 Follow-Up



Challenge: Training new staff members is challenging - especially in remote work environments. Managers constantly remind staff to “think critically” when reviewing documents.

AI Use Case: Staff members can use AI to double check their reviews and identify areas they may have missed.

Question 5 Follow-Up



Challenge: Teams spend many hours reviewing 100s of documents during engagements.

AI Use Case: Firms are using AI to assist practitioners with detailed document synthesis and review.

Final Question

What final advice would you offer folks in terms of evaluating and approaching AI?



Q&A

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