

SESSION 1: THE TRANSFORMATIVE IMPACT OF AI
ON LEGAL AND FINANCIAL LABOR MARKETS



CUSTOMER
SERVICE OUTLOOK



95%

OF SERVICE INTERACTIONS
EXPECTED TO BE AI-POWERED
BY 2025

89%

OF ROUTINE
BANKING HANDLED
BY AI TODAY

✓ 94% SATISFACTION RATE

⚠ AUDIENCE SKEPTICISM NOTED

LEGAL SECTOR IMPACT

DETAILS	STATS
OF FIRMS USING AI (E.G., CHATGPT) HAVE REPLACED STAFF	48%
CONTRACT ANALYSIS TIME CUT, WITH 72% ACCURACY	3 HRS → 11 MINS
DOCUMENT REVIEW IN CLASS-ACTION FIRMS NOW AI-LED	73%
CASE PREP TIME CUT, DISPLACING 32% OF RESEARCH GROUPS	42 HRS → 9 HRS
GENERAL COUNSELS EXPECT IMMEDIATE COST SAVINGS VIA AI	96%

CROSS-SECTOR THEMES



PROFESSIONALS MUST ADAPT
AND UPSKILL FOR
AI-ENHANCED ROLES



FEWER ENTRY-LEVEL JOBS,
THREATENS TRADITIONAL
PIPELINES



ETHICAL, REGULATORY AND
TRUST CONCERNS
REMAIN KEY



SESSION 2: ADOPTING AI IN FUND ADMINISTRATION:
INSIGHTS AND USE CASES FROM INDUSTRY LEADERS



NOTABLE STATISTICS AND PROJECTIONS

METRIC	VALUE/IMPACT
NAV AUTOMATION ACCURACY	IMPROVED FROM 80% TO 96%+ USING AI
DISCLAIMER TEXT OPTIMIZATION	REDUCED TOTAL VARIATIONS BY 30% WITH AI
PROJECTED AI COST SAVINGS BY 2030	\$500 BILLION FOR ASSET MANAGERS
AI USE CASES IDENTIFIED BY FUND ADMINS	OVER 500+ EFFICIENCY-ORIENTED INITIATIVES
ERROR REDUCTION IN LLMS	DRAMATIC DROP IN HALLUCINATIONS FROM EARLY GPT TO COMPLEX REASONING MODELS

AI IN ACTION



EMAIL ANALYSIS:
SENTIMENT AND URGENCY CLASSIFICATION FOR FASTER RESPONSES



PORTFOLIO ACCOUNTING:
INCREASED AUTOMATION FROM 80% → 96%+



DOCUMENT EXTRACTION:
AI READS SUBSCRIPTION LETTERS AND AUDIT REPORTS FOR STRUCTURED INSIGHTS



AGENTIC AI:
AUTONOMOUS READING OF DEAL TERM SHEETS, TRIGGERING WORKFLOWS, AND NOTIFYING OPS TEAMS

SESSION 3: TRANSFORMING OPERATIONAL DUE DILIGENCE WITH AI

⚠️ CHALLENGES AND CONSIDERATIONS



HUMAN OVERSIGHT: VALIDATE
AI OUTPUT



DATA SECURITY: ENCRYPTION
AND DATA OWNERSHIP KEY



MANAGER RELUCTANCE:
RESISTANCE TO DIGITAL FORMS



REGULATORY COMPLIANCE: AI
OUTPUT MAY TRIGGER LEGAL ISSUES

✅ BENEFITS AND EFFICIENCIES



TIME SAVINGS: REVIEWS SHORTENED
FROM WEEKS TO DAYS



ANALYST PRODUCTIVITY: ROUTINE
TASKS AUTOMATED



DDQ MANAGEMENT: FASTER
DISTRIBUTION AND REVIEW



DATA REUSE: CROSS-CLIENT
DOCUMENT SHARING

EVOLUTION OF ODD TECHNOLOGY

TIME PERIOD	DESCRIPTION
PRE-2007	MANUAL REVIEWS, PAPER DOCUMENTATION, AND IN-PERSON MEETINGS.
POST-2007	INTRODUCTION OF LAPTOPS, ONLINE DATABASES, AND VIDEO CONFERENCING (ESPECIALLY POST-COVID).
CURRENT	AI AND TECH PLATFORMS STREAMLINE DATA COLLECTION, DOCUMENT REVIEW, AND DDQ WORKFLOWS.

FUTURE OUTLOOK



ODD PLATFORMS WILL
CONTINUE TO EVOLVE
WITH AI AGENT
INTEGRATION



AUTOMATION WILL
INCREASE, BUT STRONG
GOVERNANCE IS
ESSENTIAL



FOCUS ON BALANCING
EFFICIENCY, ACCURACY,
AND REGULATORY
INTEGRITY

SESSION 4: AI IN ASSET MANAGEMENT – NAVIGATING
INNOVATION, RISK, AND RESPONSIBILITY

AUTONOMOUS ASSET MANAGEMENT

AI BOT HANDLES RISK MANAGEMENT,
PERFORMANCE REPORTINGAUTONOMOUS AI REQUIRES
STRONG DESIGN PRINCIPLESOVERSIGHT IS CRITICAL TO ENSURE
RELIABLE AI OUTCOMES

APPLICATIONS ACROSS ASSET MANAGEMENT

TRADING ANOMALY
DETECTIONRISK AND COMPLIANCE
MONITORINGFRAUD DETECTION IN NGO
SPENDING PATTERNS

RISKS AND CONSIDERATIONS

RISK/CONSIDERATION	DETAIL
"GARBAGE IN, GARBAGE OUT"	MODEL OUTPUT DEPENDS ON DATA QUALITY
AI INTERPRETABILITY	DEBATE OVER NEED FOR FULL AI INTERPRETABILITY VS. STATISTICAL PERFORMANCE
LINEAR EXPLAINABILITY TOOLS	MAY WEAKEN NONLINEAR AI PERFORMANCE
AGI CONCERNS	STILL DISTANT – OVER-RELIANCE IS RISKY

INDUSTRY OUTLOOK AND RESPONSIBLE AI AND TEAMING

CATEGORY	DETAILS
INDUSTRY OUTLOOK	AI IS CRUCIAL FOR ALPHA IN A SATURATED, FAST-MOVING MARKET
	HUMAN + MACHINE COLLABORATION IS THE FUTURE OF ASSET MANAGEMENT
	AI REDEFINES PATTERN RECOGNITION ACROSS ASSET CLASSES
SMART EVALUATE	CROSS-FUNCTIONAL TEAMS REQUIRED: INVESTMENT, COMPLIANCE, TECH, DATA
	"T-SHAPED TEAMS" CONCEPT (CFA) AS A RESPONSIBLE AI MODEL GOVERNANCE, MODEL INTEGRITY, AND EXPLAINABILITY ARE CRITICAL SUCCESS FACTORS



CONCLUSION

AI IS TRANSFORMING FUND ADMINISTRATION AND BEYOND, DELIVERING EFFICIENCY, COST SAVINGS, AND SCALE WHILE USHERING IN A NEW ERA OF WORKFORCE DYNAMICS, ETHICAL CONSIDERATIONS, AND SKILL REQUIREMENTS.

CONFERENCE TAKEAWAYS

CATEGORY	INSIGHT
AI IMPACT	DRIVING EFFICIENCY, COST SAVINGS, AND SCALE ACROSS FUND ADMINISTRATION AND FINANCIAL SERVICES.
ADOPTION STATUS	AI IS NO LONGER OPTIONAL – IT'S ALREADY DELIVERING MEASURABLE RESULTS.
PRIMARY GOALS	FOCUSED ON EFFICIENCY GAINS AND SERVICE ENHANCEMENT, NOT JUST COST SAVINGS.
STRATEGIC PRIORITIES	DATA PRIVACY, HUMAN OVERSIGHT, AND EMPLOYEE TRAINING ARE NON-NEGOTIABLE IN AI STRATEGIES.
FUTURE OUTLOOK	RAPID AI GROWTH EXPECTED IN NEXT 18–36 MONTHS, ESPECIALLY IN AGENTIC AI AND BLOCKCHAIN USE CASES.
WORKFORCE IMPLICATIONS	REQUIRES NEW SKILLS, CROSS-FUNCTIONAL TEAMS, AND A SHIFT IN HOW HUMAN VALUE IS DEFINED IN THE INDUSTRY.
RESPONSIBLE DEPLOYMENT	GOVERNANCE, ETHICAL FRAMEWORKS, AND EXPLAINABILITY ARE ESSENTIAL FOR SUSTAINABLE AI ADOPTION.