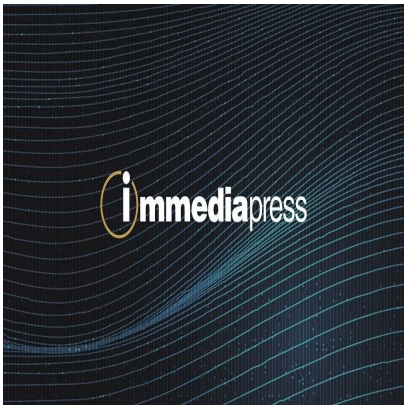

62% of financial services professionals say an AI-generated error has reached a client

Descrizione

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COMUNICATO STAMPA â?? CONTENUTO PROMOZIONALE

New Macabacus report finds AI adoption has outpaced the guardrails needed to keep client-facing models and documents accurate.

NEW YORK, Sept. 10, 2026 /PRNewswire/ â?? Macabacus, the leading M365 productivity platform for finance and professional services teams, today released the report: GenAI for Financial Services: Velocity and Verification. The report finds that AI now sits at the core of model creation and client presentation development, but most firms lack the review and verification layer needed to catch AI-generated errors before they reach clients.

Drawing on a survey of Macabacusâ?? 75,000 users and analysis of conversations with hundreds of clients and prospects, the report quantifies the gap between how fast AI is being adopted and how slowly firms are building guardrails to ensure their clients can trust their deal content.

â??AI is now involved in the majority of models and documents that reach clients, with 87% of firms saying they use AI daily or weekly for this work,â?• said Paul Ross, Chief Marketing Officer, Macabacus. â??Deal teams should not slow down their use of AI. They need guardrails that let them move faster while maintaining accuracy and their clientsâ?? trust. That is what Macabacus is built for.â?•

Key findings include:

Download the report here: https://macabacus.com/lp/2026-ai-report

About Macabacus

Macabacus is the leading Microsoft-native productivity platform for finance and professional services teams. When a deal document has to be right, professionals use Macabacus. Trusted by 3,000 firms and 75,000 users across investment banking, private equity, asset management, consulting, advisory, and corporate finance, Macabacus helps users rapidly create and check financial models and deal documents. By combining powerful productivity tools with AI-powered review and automation, Macabacus enables organizations to execute with greater speed, accuracy, and confidence. Learn more at www.macabacus.com

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