

Claude's Finance Agents

What Every Finance Graduate Needs to Know

By Mahesh Ramanujam, FCA

May 10, 2026

promptedgrad.com

What Happened

On 5 May 2026, Anthropic launched 10 purpose-built AI agent templates for banking, accounting, investment, and compliance work. These are structured workflows — not generic chat tools — that combine AI reasoning, financial data access, and domain instructions to automate tasks that currently take finance professionals hours or days.

Two Tracks — 10 Agents

Track	Agent	What It Does
Research & Client Coverage	1. Pitch Builder	Builds comps models and drafts pitch decks
	2. Meeting Preparer	Assembles client briefings and talking points
	3. Earnings Reviewer	Reads transcripts, flags model update needs
	4. Model Builder	Constructs DCF, LBO, three-statement models
	5. Market Researcher	TAM sizing, competitive and regulatory landscape
Finance & Operations	6. Valuation Reviewer	Checks methodology, arithmetic, and assumptions
	7. GL Reconciler	Matches entries, surfaces exceptions for review
	8. Month-End Closer	Automates close checklist — accruals, provisions
	9. Statement Auditor	First-pass review for ratio anomalies, gaps
	10. KYC Screener	Assembles CDD file, rates risk, packages escalation

What Actually Changes at Work

Changes	Does NOT Change
Time spent on data gathering & first-draft work	Professional judgment on borderline items
Document assembly (KYC files, pitch decks, reports)	Client relationships and contextual intelligence
Reconciliation and matching (GL, bank recs)	Professional accountability and sign-off responsibility
First-pass review (ratios, consistency checks)	Understanding why the numbers are what they are

3 Prompts You Can Try in Claude.ai Today

GL Reconciler

Bank balance ■48,32,500 vs cash book ■47,89,200. Difference ■43,300. Outstanding cheques ■1,12,000 | Deposits in transit ■68,700 | Bank charges ■2,000 | Interest credited ■1,000. Build a bank reconciliation statement and confirm adjusted balances on both sides.

Statement Auditor

Revenue grew 35% YoY but receivables grew 80% YoY. Gross margin fell 22% to 17%. Inventory days rose 45 to 72. Identify audit risk flags, which assertions are at risk (existence, valuation, completeness, cut-off), and recommend audit procedures for each.

Valuation Reviewer

WACC 11.5%, terminal growth 5%, FCF ■42 crore Year 1 growing 18% for 5 years. Implied EV ■680 crore. Specialty chemicals sector. Flag aggressive assumptions, explain reasoning, suggest sensitivity cases to present alongside the base case.

3 Actions for Graduates — Next 30 Days

Try the prompts above in Claude.ai. Understand what the agents do by experiencing them — not just reading about them.

Review AI output critically. The key skill is spotting a plausible-sounding wrong answer. Practice this deliberately.

Build judgment vocabulary. For every task you run through AI, ask: what would a wrong output look like, and would I catch it?

Full article with interactive agent finder and role-specific prompts: promptedgrad.com/anthropic-finance-agents-graduates/

© 2026 PromptedGrad · Written by Mahesh Ramanujam, FCA · Free for personal and educational use