



Google AI Integration for Financial Services

Course description

Learn how to leverage Google Workspace with Gemini, NotebookLM Enterprise, Gemini Enterprise, and Gemini Gems to transform financial analysis, reporting, client communication, compliance workflows, and investment research. Discover practical AI-driven solutions that help financial professionals automate routine tasks, generate insights faster, improve decision-making, and enhance operational efficiency in a secure and responsible manner.

The course also introduces Gemini Gems for building customized financial assistants and demonstrates how AI can streamline reporting, compliance, due diligence, investor communications, and financial decision-making. Through practical demonstrations and financial use cases, learners gain hands-on exposure to AI-powered financial services workflows.

- Course level: Intermediate
- Duration: 1 day

Activities

This course includes instructor-led training, demonstration-based learning, financial services use cases, scenario-based exercises, ai agent development workshops, guided hands-on activities, interactive discussions, and best practice reviews to reinforce learning.

Course objectives

In this course, you will learn to:

- Use Google Workspace with Gemini to enhance financial reporting and communication.
- Analyze financial data and trends using AI-assisted workflows.
- Leverage NotebookLM Enterprise for secure document analysis and research.
- Create AI-powered summaries from reports, transcripts, and regulatory documents.
- Build specialized financial AI agents using Gemini Enterprise.
- Develop custom Gemini Gems for financial use cases.
- Automate repetitive financial analysis and reporting tasks.
- Apply responsible and secure AI practices in financial environments.
- Generate actionable insights from large volumes of financial data.

Key features

- AI-Powered Financial Productivity
- Google Workspace with Gemini Integration
- NotebookLM Enterprise for Financial Intelligence
- Gemini Enterprise AI Agents
- Financial Research Automation
- Compliance and Risk Assessment
- Gemini Gems Customization
- Unified AI Financial Solutions

Intended audience

This course is intended for:

- Financial Analysts
- Portfolio Managers
- Client Advisors
- Investment Bankers
- Compliance Officers
- Accountants

- Wealth Management Professionals
- Financial Operations Teams
- Financial Technology Leaders

Prerequisites

We recommend that attendees of this course have:

- Basic familiarity with Google Workspace applications.
- Understanding of financial services terminology.
- Basic knowledge of Google Workspace with Gemini.
- Familiarity with NotebookLM fundamentals.
- Basic understanding of Gemini Enterprise.
- Awareness of data security and compliance concepts.

Products covered

- Google Workspace with Gemini
- Gemini
- Gemini Enterprise
- Gemini Gems
- NotebookLM Enterprise

Course outline

Module 01 - Prompt Guidelines for Financial AI

- Prompt Structure
- Prompt Engineering Best Practices
- Effective AI Instructions
- Optimizing AI Responses

Module 02 - Google Workspace with Gemini Integration

- Summarizing Quarterly Financial Reports
- Analyzing Financial Data Trends in Google Sheets
- Drafting Client Communications
- Creating Presentation Outlines

- Summarizing Earnings Call Transcripts

Module 03 - NotebookLM Enterprise Integration

- Comparing Quarterly and Annual Reports
- Preparing for Client Meetings
- Regulatory and Compliance Research
- Investment Research Analysis
- Due Diligence Document Review
- Client Education Content Creation

Module 04 - Gemini Enterprise Integration

- Deep Research Agent
- Idea Generation Agent
- Compliance Risk Assessment Agent
- ESG Regulatory Impact Assessment Agent
- IFRS / 10-K Financial Analyst Agent

Certification details

Participants receive a course completion certificate upon successfully completing the training program.

FAQs

Who should attend this course?

This course is designed for finance professionals seeking to improve productivity and decision-making using Google AI technologies.

Is prior AI experience required?

Basic familiarity with Gemini and NotebookLM is recommended, but extensive AI expertise is not required.

What financial use cases are covered?

Financial reporting, investment research, earnings analysis, compliance reviews, due diligence, client communication, ESG assessment, and investor relations.

Is this a hands-on course?

The course includes demonstrations, practical exercises, and real-world financial use cases.

What AI products are covered?

Google Workspace with Gemini, Gemini Enterprise, Gemini Gems, and NotebookLM Enterprise.

Will I learn how to build AI agents?

Yes. Participants learn how to create specialized financial AI agents for compliance, ESG assessment, research, and financial analysis.

How long is the course?

The course is delivered in a 3-hour instructor-led format.

What business benefits can organizations expect?

Organizations can improve reporting efficiency, accelerate research, enhance compliance workflows, automate repetitive tasks, and make better data-driven decisions using Google AI technologies.