

## Event Report: Workshop on Agentic AI in Financial Services at AAI 2026

Financial services play a crucial role in everyday life, requiring expert-level support to meet highly personalized user needs across domains like banking, insurance, and taxation. The emergence of foundation models, especially large language models (LLMs), has introduced new capabilities in communication, reasoning, and personalization that align well with financial decision-making processes. Recently, agentic AI has extended these models by enabling them to autonomously plan, reason, and act across multi-step tasks, making them highly suitable for complex use cases such as financial advising and compliance.

The first workshop on Agentic AI in Financial Services was held at AAI on January 26, 2026, aiming to bring together both researchers and practitioners to explore the latest advances in agentic AI for a wide range of financial services, and to discuss new ideas related to the design, deployment, ethics, and real-world impact that AI can bring to the financial domain.

The workshop consisted of three keynote talks. Feng Liu (The University of Melbourne) explored the idea of model reprogramming, and how existing pre-trained models can be repurposed for downstream applications such as customizing language models to detect fraudulent transactions, automate customer support, or enhance risk assessment in banking and insurance. Hariharan Suresh (NVIDIA) demonstrated how NVIDIA's open-source agentic AI ecosystem can accelerate production-ready development in the agentic space. Guansong Pang (Singapore Management University) discussed some recent work towards building generalized graph anomaly detection models that work across domains under zero- or few-shot settings, with applications in finance.

These keynote discussions were interleaved with two oral presentation sessions, each containing three invited talks from the pool of accepted papers. Topics included time series forecasting, benchmarking AI agents, reasoning for financial tasks, model cost optimization, bias and fairness detection, and financial question answering. The workshop also hosted an incredibly active poster session, where all 22 accepted submissions (out of 57 submitted) were presented interactively. We are grateful to the diverse audience, and workshop contributors, who made the event a great success. We are excited to see what lies ahead in the agentic AI space, especially as models become increasingly capable and trusted in high-risk settings such as the financial services.

Rocky Chen, Hongxu Chen, Joel Mackenzie, Fengbin Zhu, Luiz Pizzato, Ritchie Ng, and Anna Leontjeva served on the organizing committee. Wendy Chen and Naomi (Naime) Ranjbar Kermany handled workshop logistics, and Xurong Liang acted as the web chair. This report was written by Joel Mackenzie.

Note: This is the author version of a report in the online interactive magazine of the Association for the Advancement of Artificial Intelligence, <https://interactiveaimag.org/>