inspire

MAY 18-21, 2026 ORLANDO, FL

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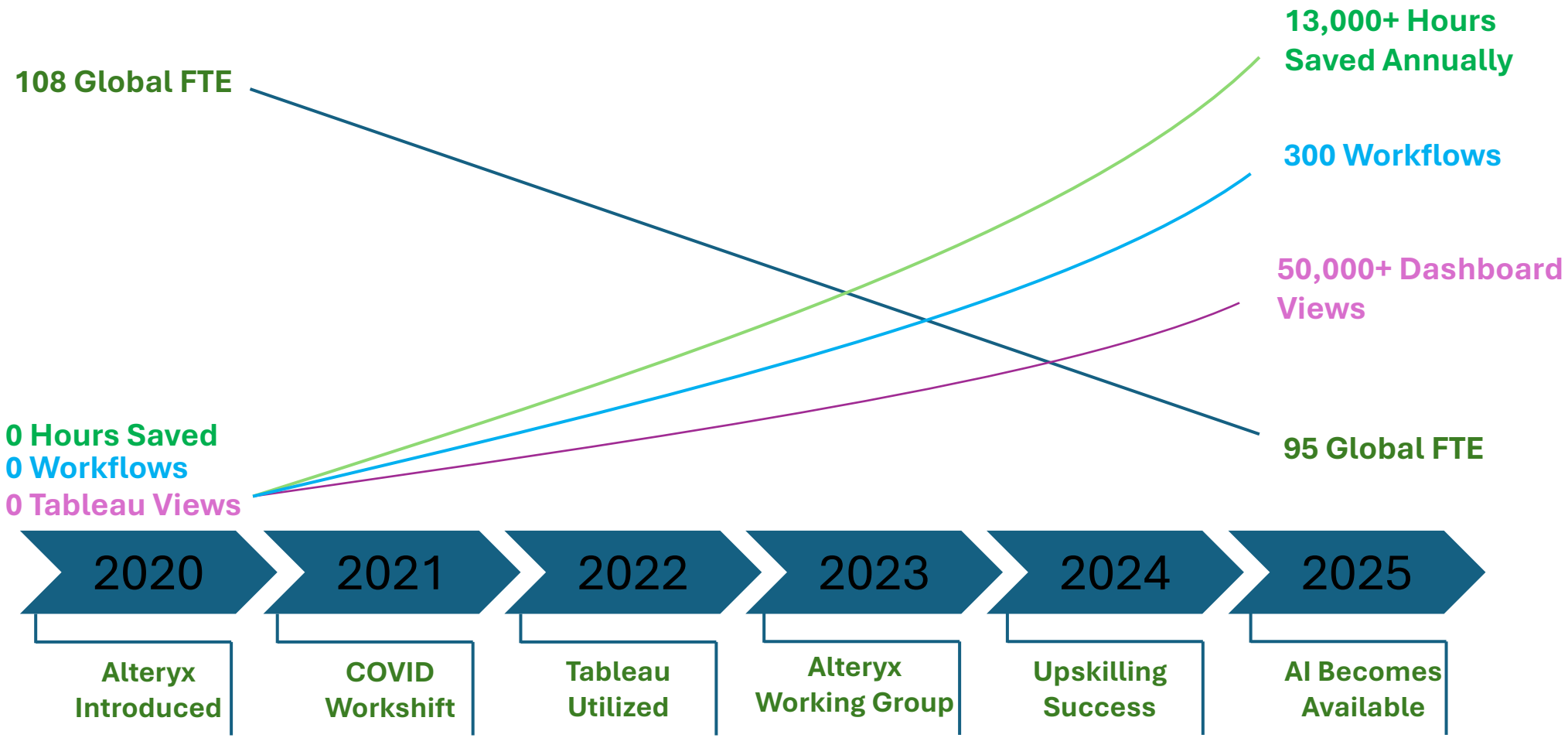
Nuveen's Playbook for AI Integration

Lessons From an AI Hackathon

Foundation First: Automation to AI



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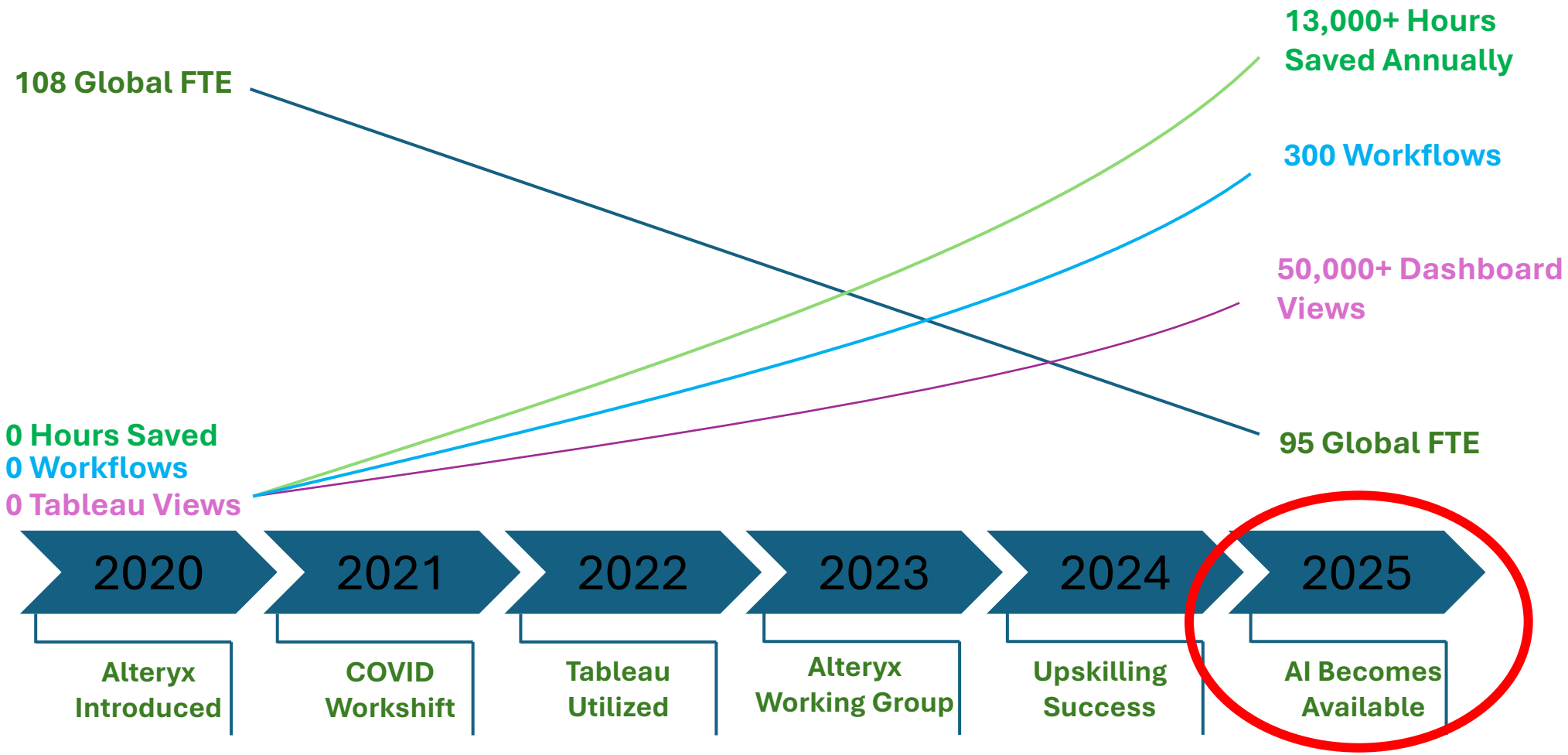
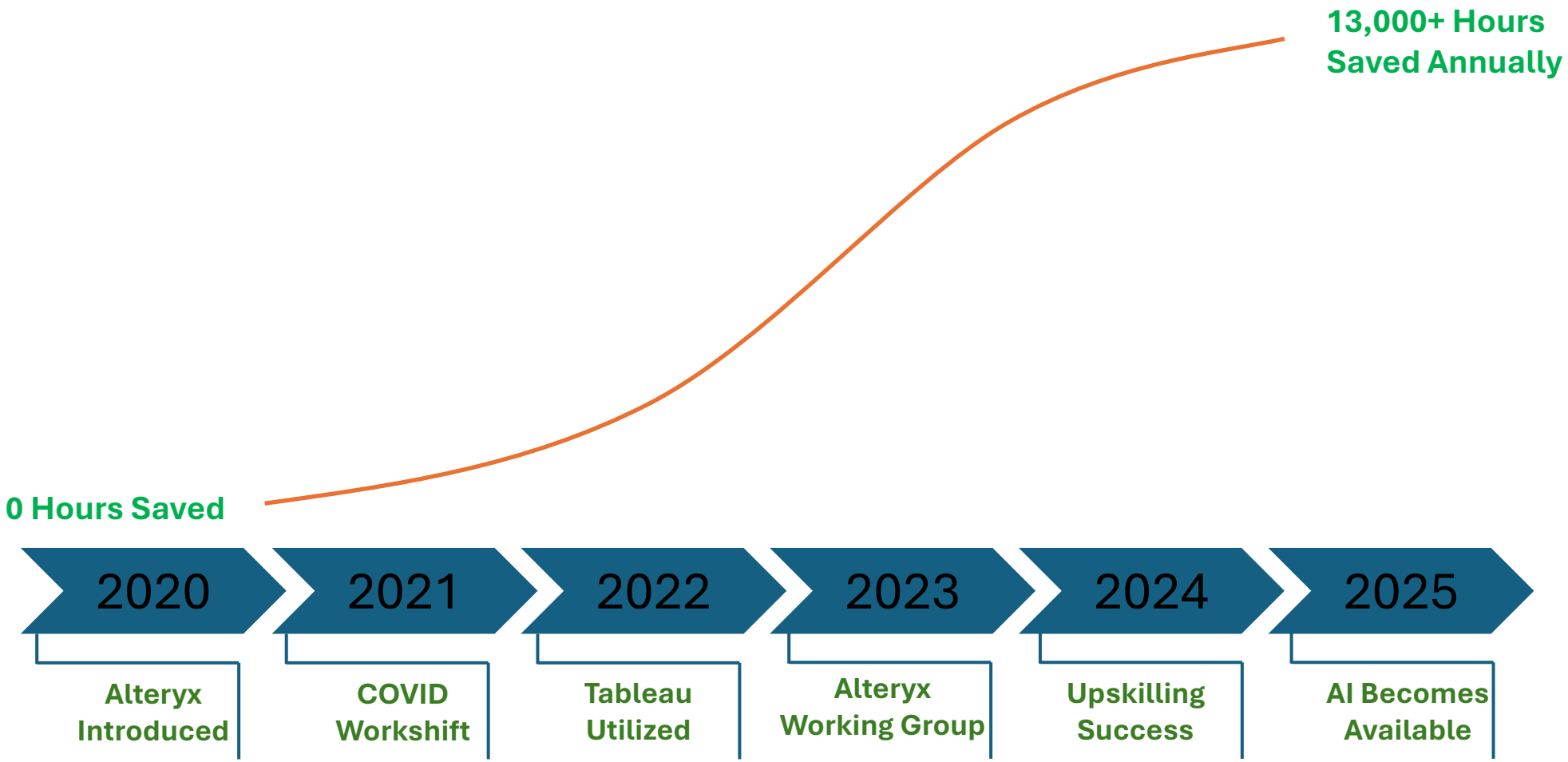


The Next Question: What's Next?



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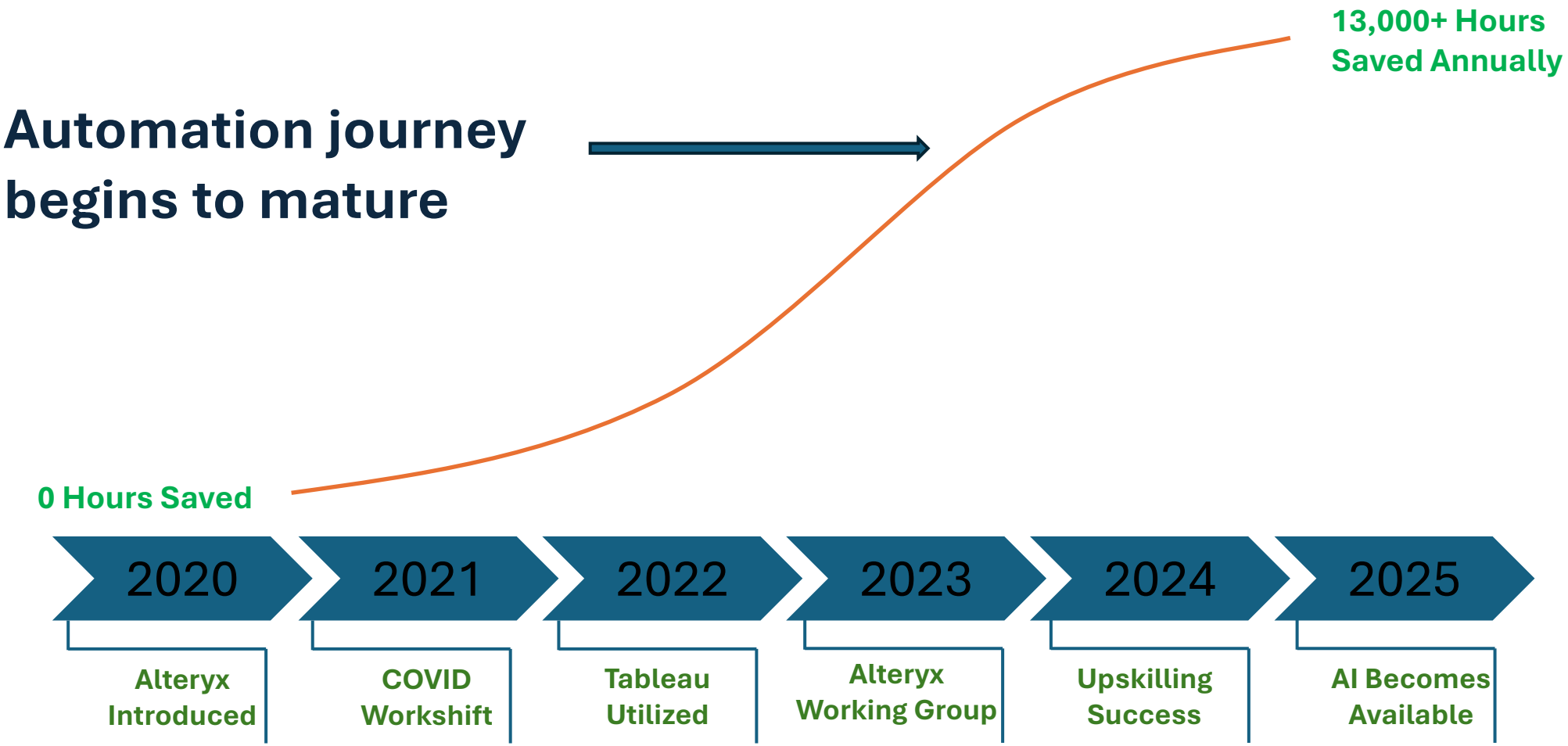
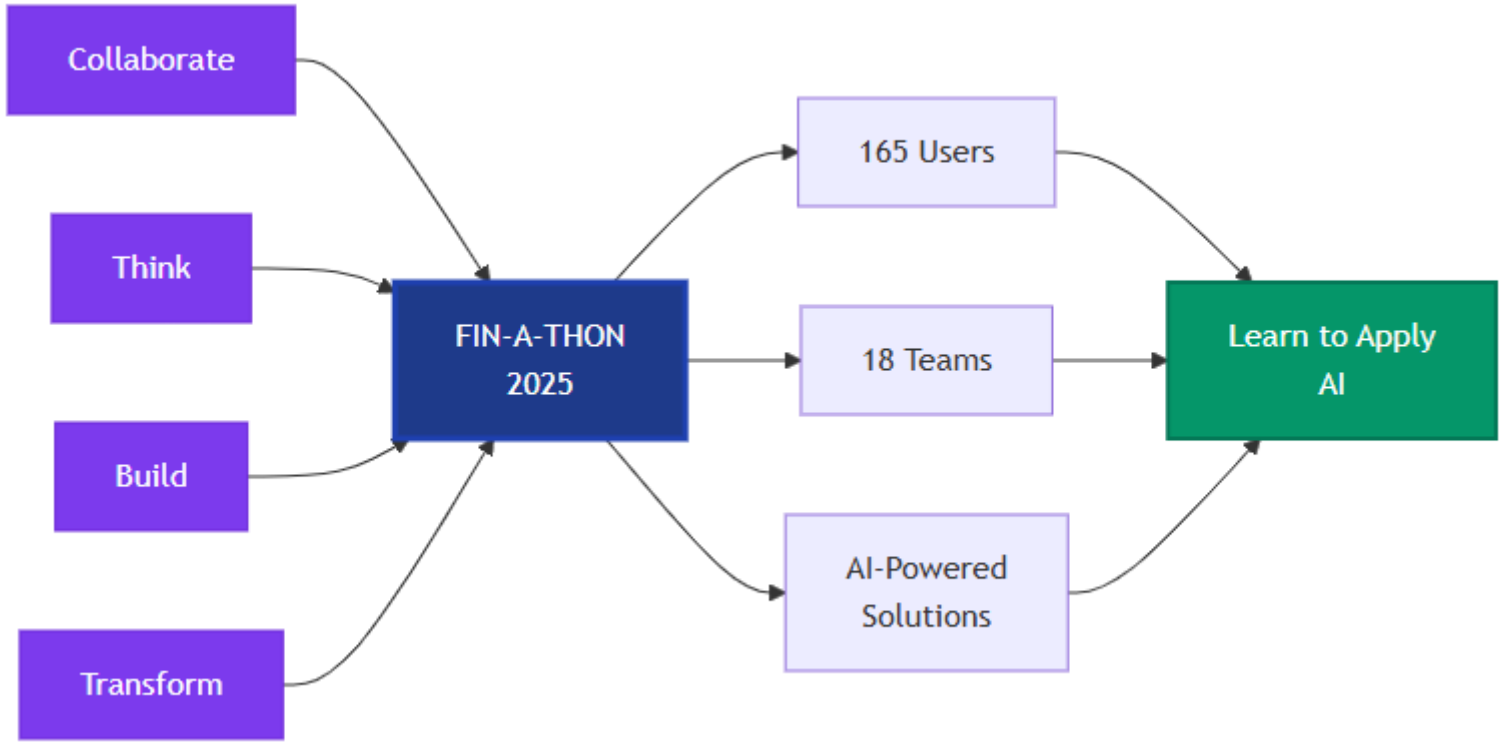


Office of CFO Hackathon



Problems from the Hackathon

Different Areas of Finance; Similar Themes

Reconciliations	Large Spreadsheets, Lots of Complexity
Data Prep	Getting the reconciliation ready is a time consumer
Small Things Make Automation Difficult	The prevalence of sub optimal identifiers and format of inputs (especially pdfs)

Automation Challenges

Unstructured Data

- No fixed fields or consistent structure for rules-based logic to anchor to
- Meaning is embedded in language and context, not in predictable locations
- Scanned files, PDFs, and emails require interpretation, not just extraction

Variable Formats

- The same data type arrives differently across vendors, counterparties, and systems
- Rules built for one format break when a new variation appears
- Maintaining an ever-growing library of format rules becomes unsustainable

Business Judgement

- Some discrepancies can't be resolved by matching fields alone
- Resolution requires business context, materiality assessment, and experience
- Automation can flag the problem but cannot decide how or whether to act on it

Lessons from the Hackathon

What Alteryx Solved

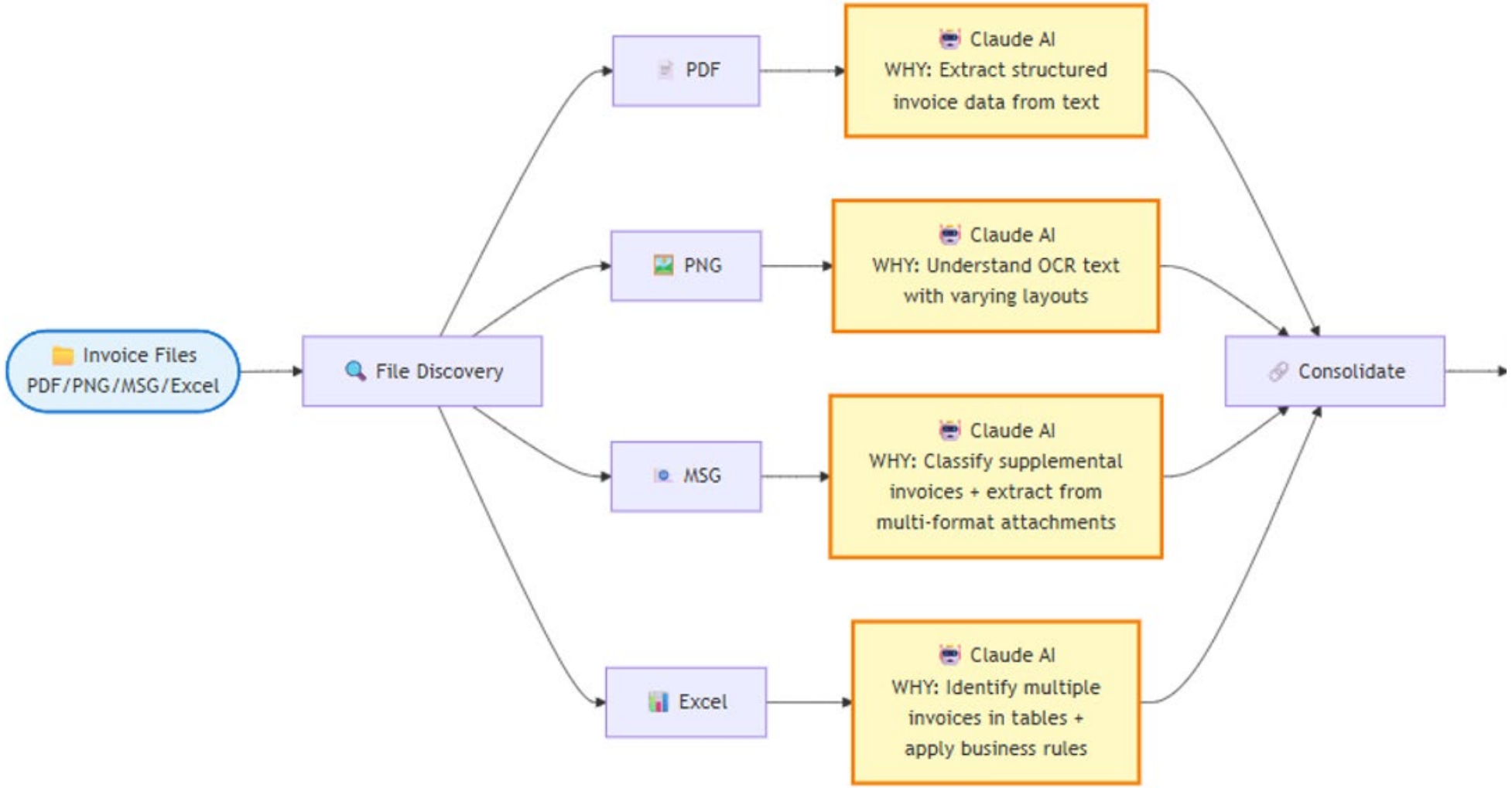
Scalability	LLMs are smart. Alteryx makes them strong.
Auditability	How you got there matters as much as the answer
Certainty	Finance and Accounting is often deterministic; LLMs are probabilistic

Lessons from the Hackathon

What AI Solved

Interpretation	AI handles the messy data rules-based systems can't
Exceptions	AI catches the exceptions that rules-based systems were never built to
Context	SME expertise becomes a repeatable input, not a one-time conversation

A Hackathon Example



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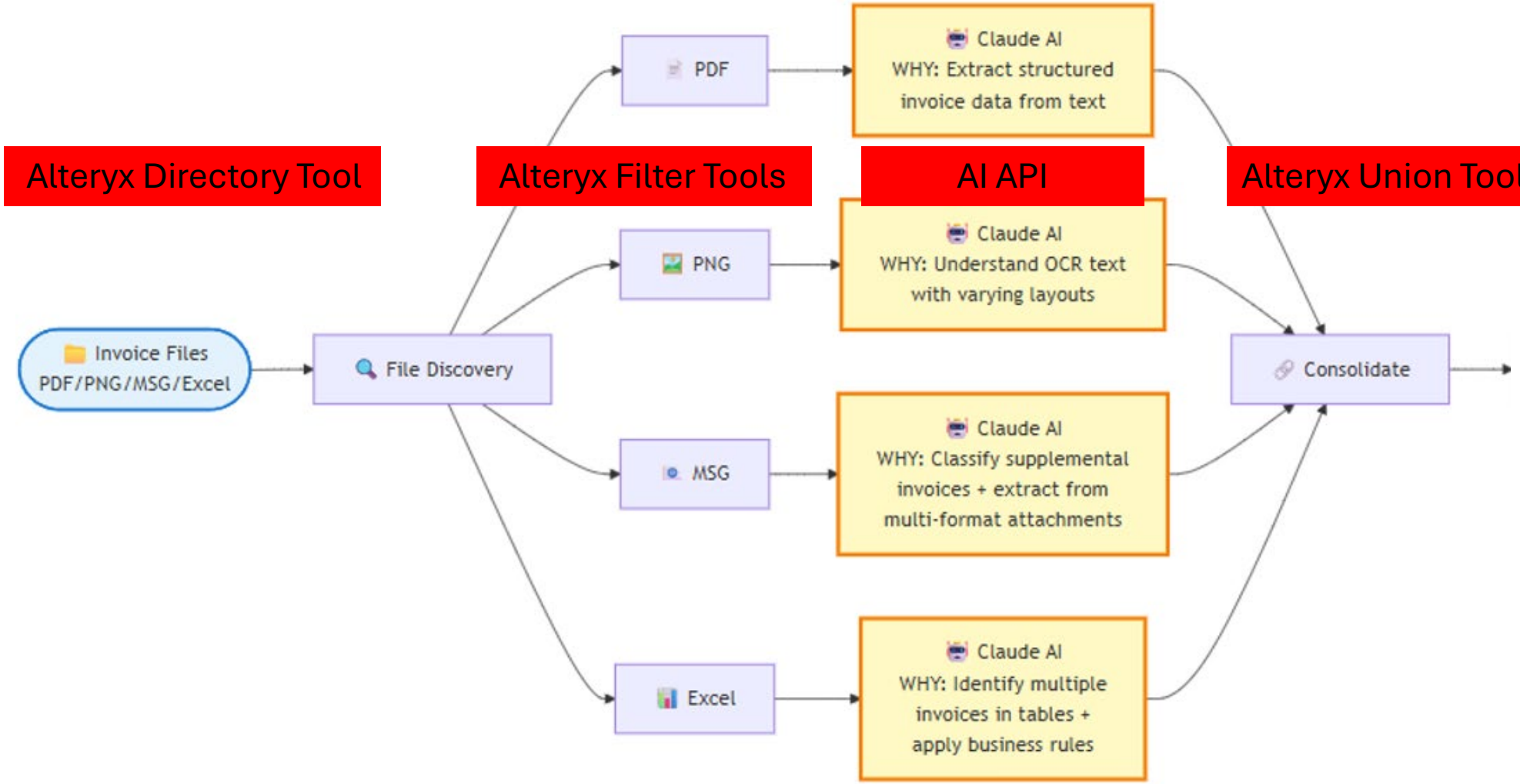
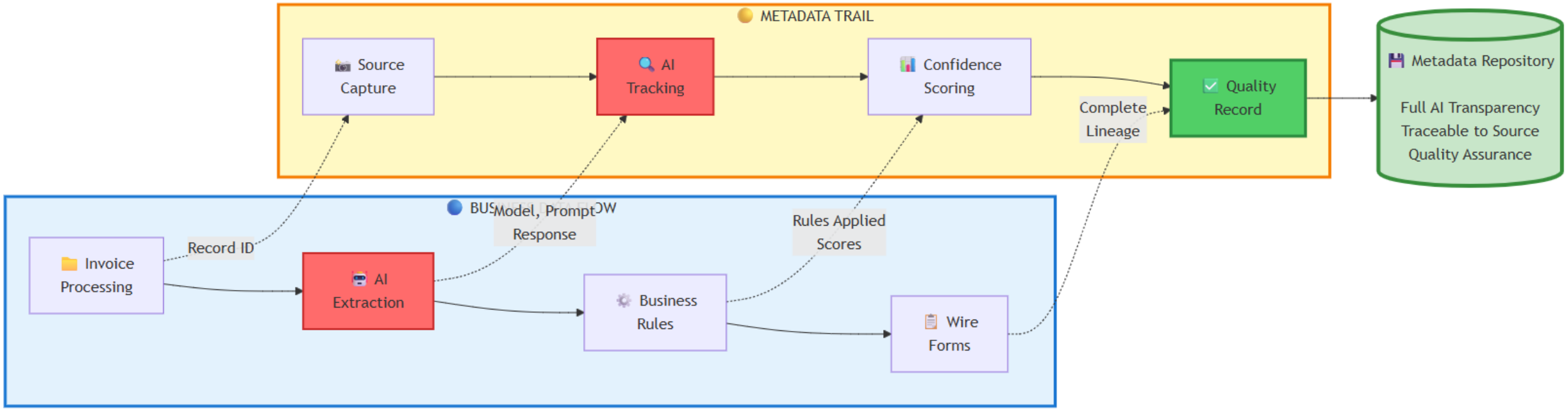
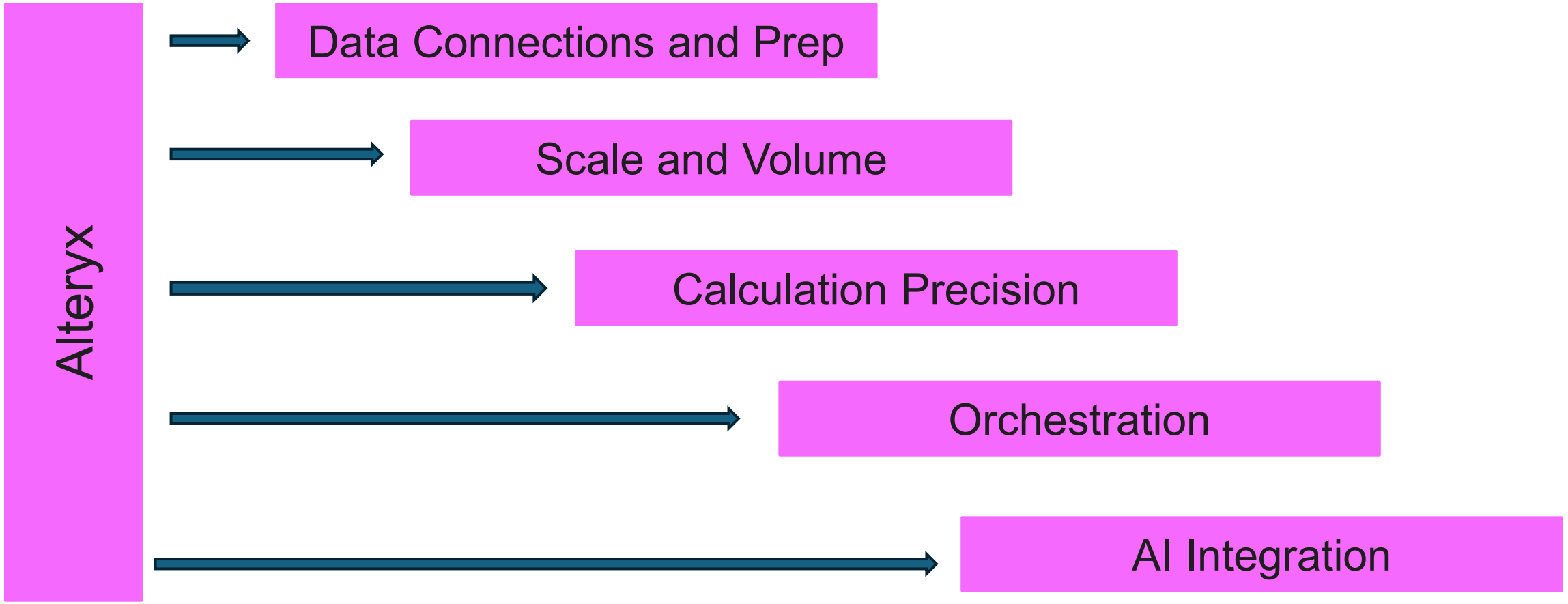


A Hackathon Example: Transparency



Lessons from the Hackathon

Alteryx as the Quarterback

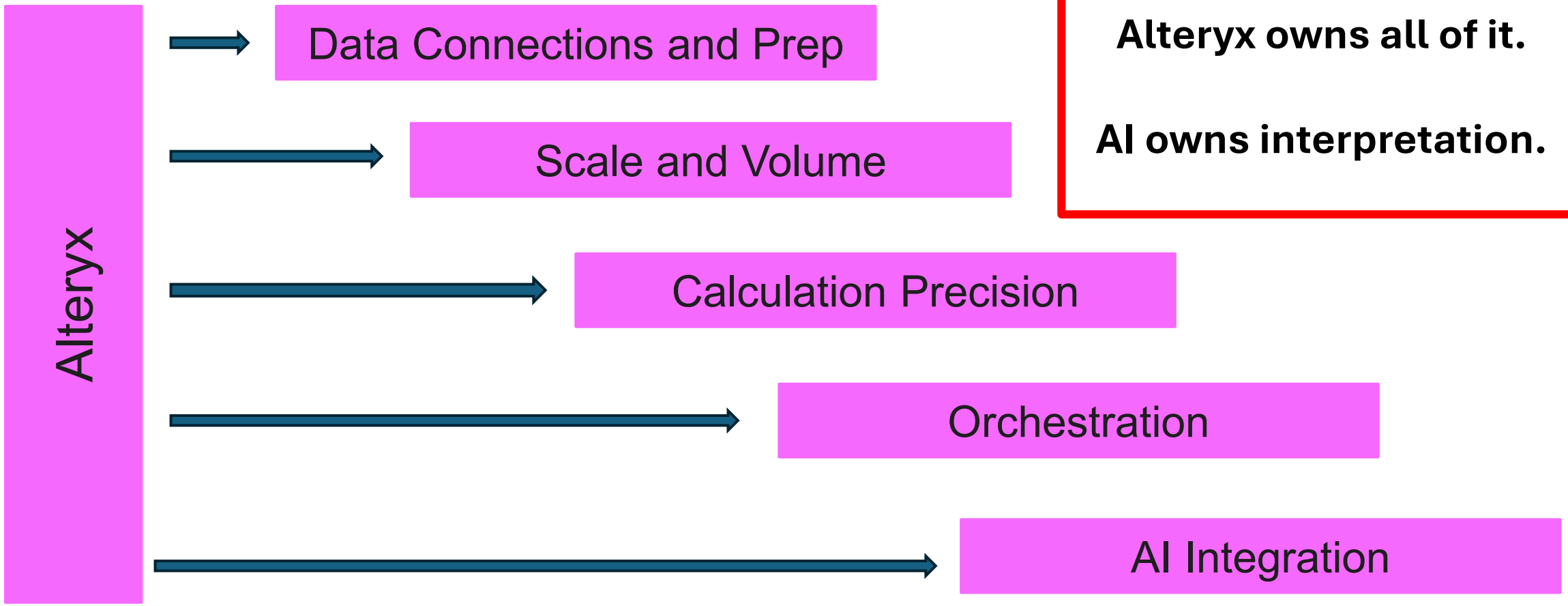


Lessons from the Hackathon

Alteryx as the Quarterback

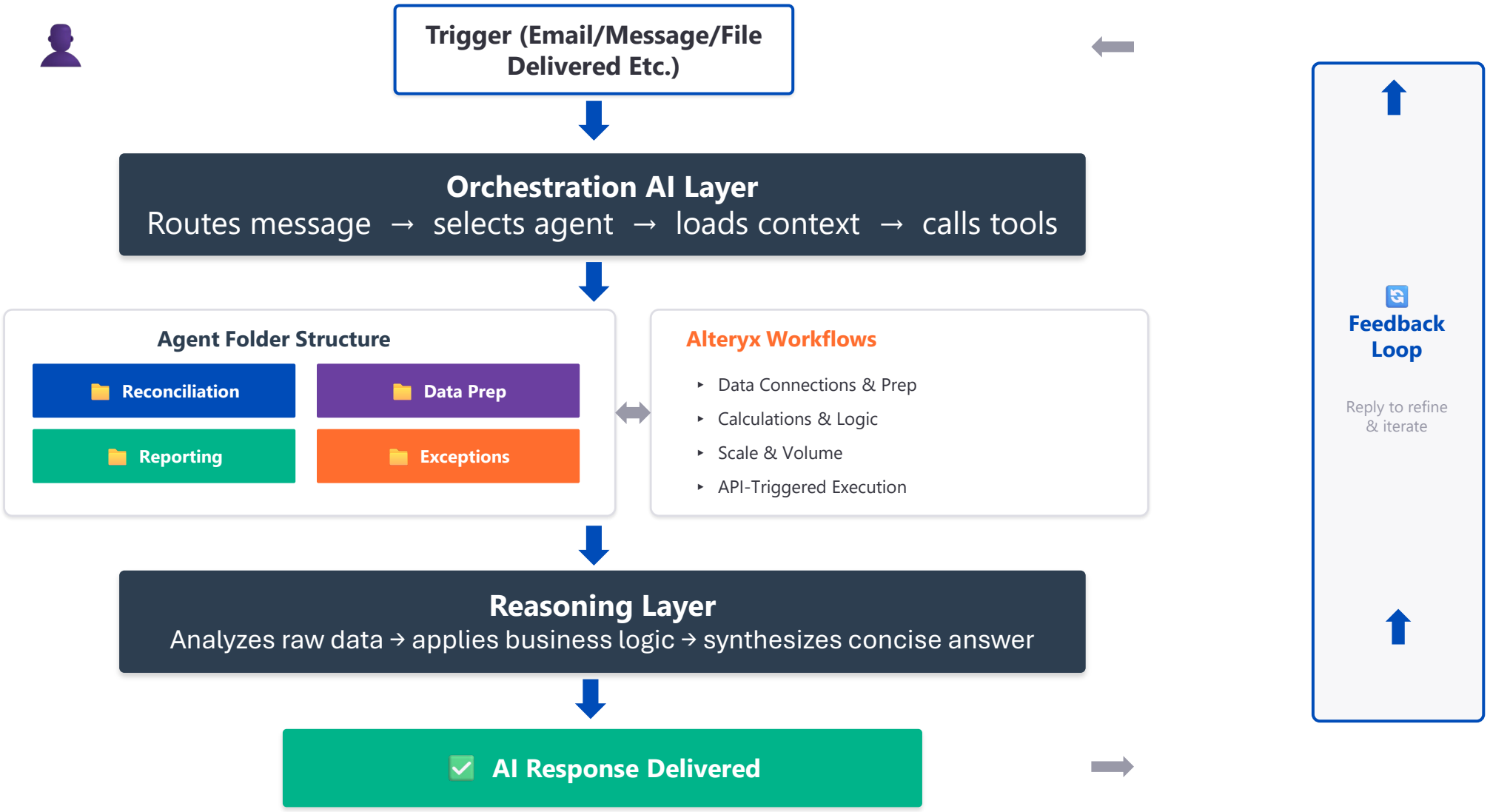
Scale. Prep. Audit. Orchestrate. Calculate. Alteryx owns all of it.

AI owns interpretation.



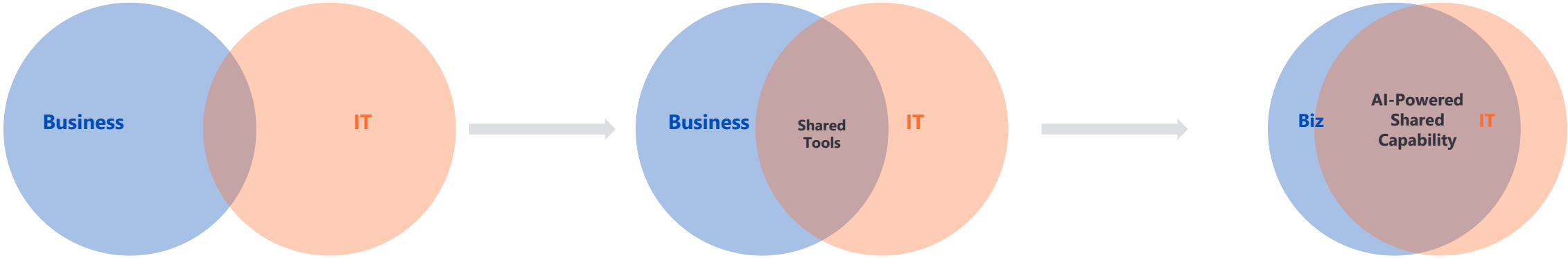
What's Next

AI-Powered Workflow Architecture



The Bigger Shift

Business & IT: From Silos to Shared Capability



10 Years Ago

Separate worlds.
IT builds, Business requests.

5 Years Ago

Automation bridges the gap.
Business starts building.

Today

AI empowers Finance.
Business teams lead, IT enables.

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