

# AI Advantage

Turning Innovation into Real Impact

**EMERGE** 2025



**4.7M** Sq.foot of  
office space leased by  
AI Companies in SF

Headquartered in SF



ANTHROPIC

**297** AI Companies

**20/50** best-funded  
AI startups based in SF

**54K**  
AI-related jobs

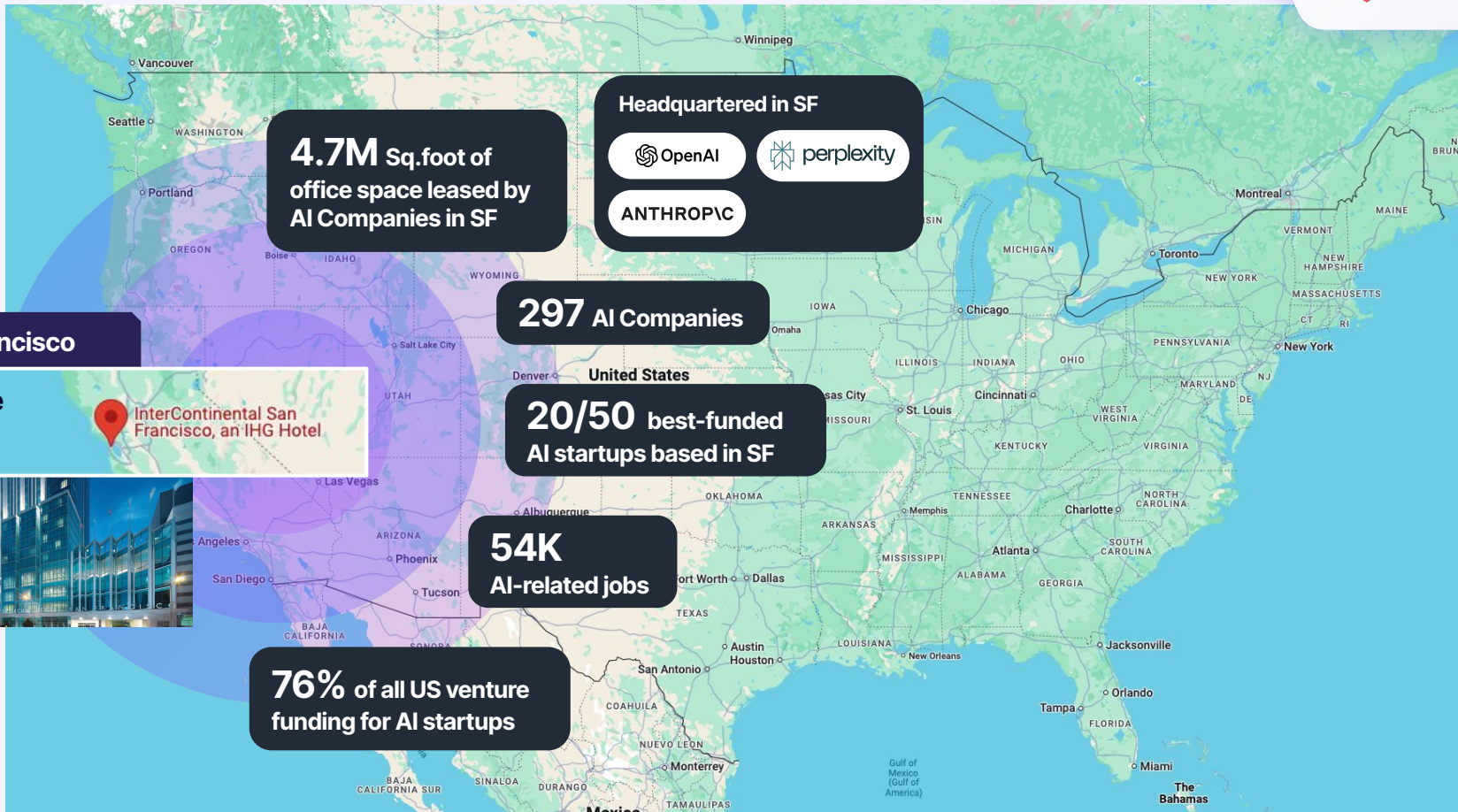
**76%** of all US venture  
funding for AI startups

San Francisco

You are  
Here



InterContinental San  
Francisco, an IHG Hotel

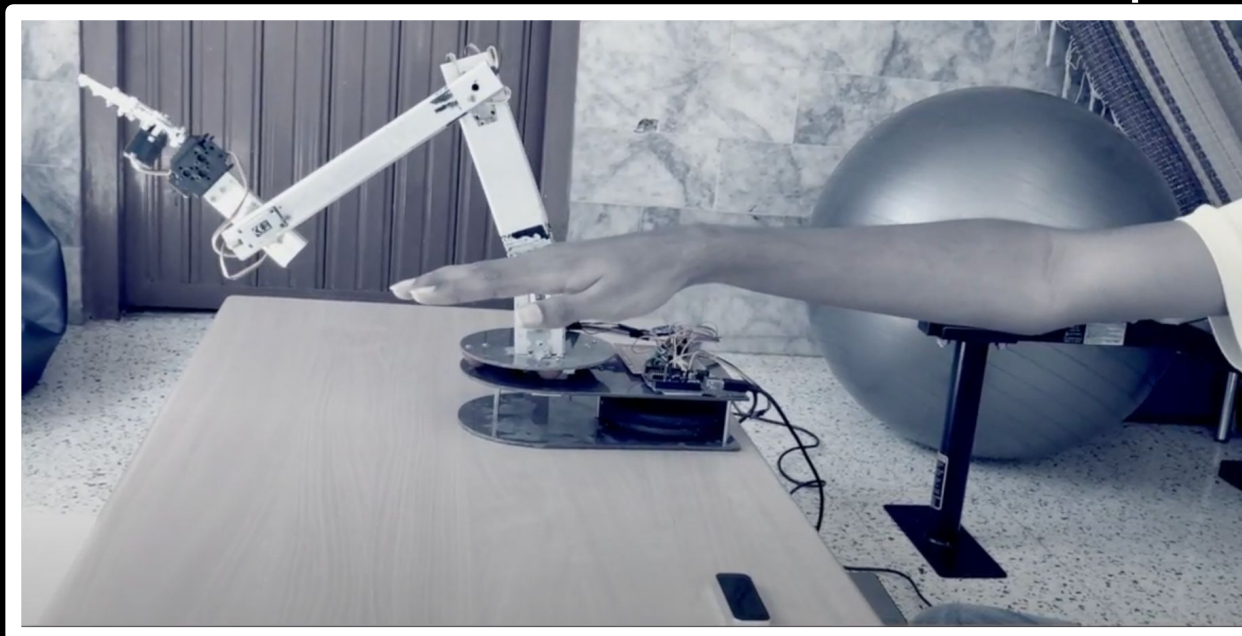






Iron Man

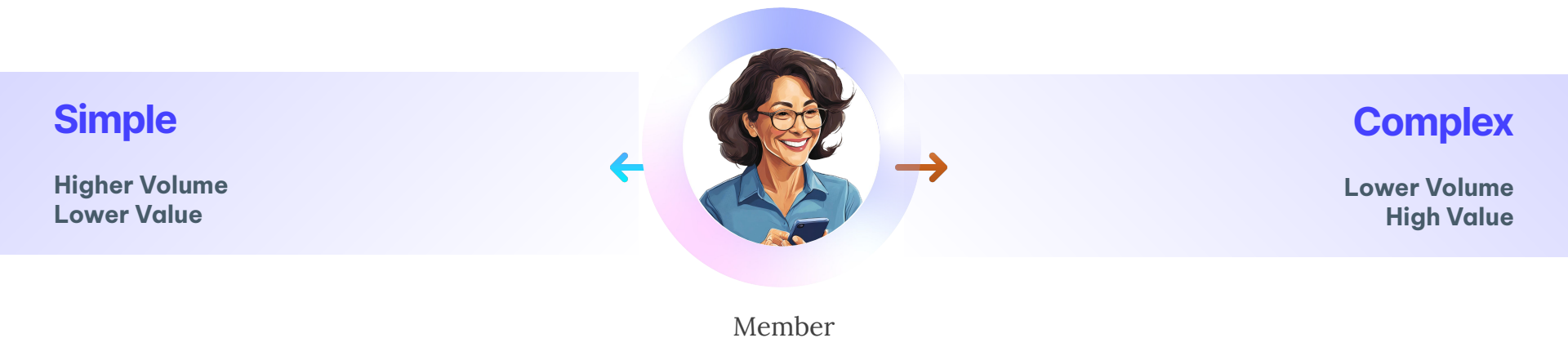
Iron Man  
on a budget



A large background collage composed of numerous small video frames. Each frame shows a different person, mostly of diverse age and ethnicity, engaged in using a smartphone. The settings vary from indoor spaces like living rooms and offices to outdoor locations like parks and city streets. The overall theme is digital connectivity and mobile usage.

# It's all about conversations

# Conversations CFIs have with their consumers



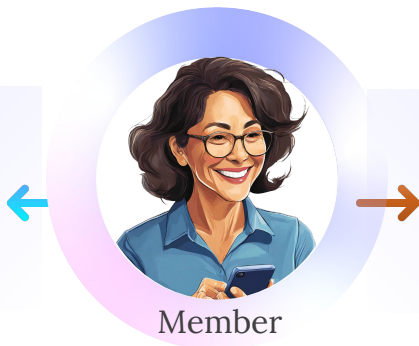
Withdrawals	Check Cashing	Account Issues	Wires	Commercial Loans	Mortgage
Transactions	Account Balance	Deposits	Payments	New Accounts	Notary
Transfers	Bill Pay	Web Issues	Fund Accounts	Personal Loans	Insurance
					Investments

# Conversations in the era of AI

**Automate**

**Simple**

**Automate &  
Self Serve**



**Augment**

**Complex**

Lower Volume

**Human Touch  
w/ Empathy**

Account Issues

Wires

C

Deposits

Payments

New Account

Web Issues

Fund Accounts

# ***Consumer Experience***

# ***Workforce Experience***

**AI Strategy**



# Innovation into Impact

# Buddy Bennett

Chief Operating Officer



# EMERGE

**Craig McLaughlin**

Chief Operating Officer

**FINALYTICS.AI**



**EMERGE**

**Kate Alter**

AVP, Enterprise Applications



TRUSTONE

EMERGE

**Mike Brine**

VP, Member Services



TRUSTONE

EMERGE

**Ron Winter**

Chief Technology Officer

**INROADS**  
credit union

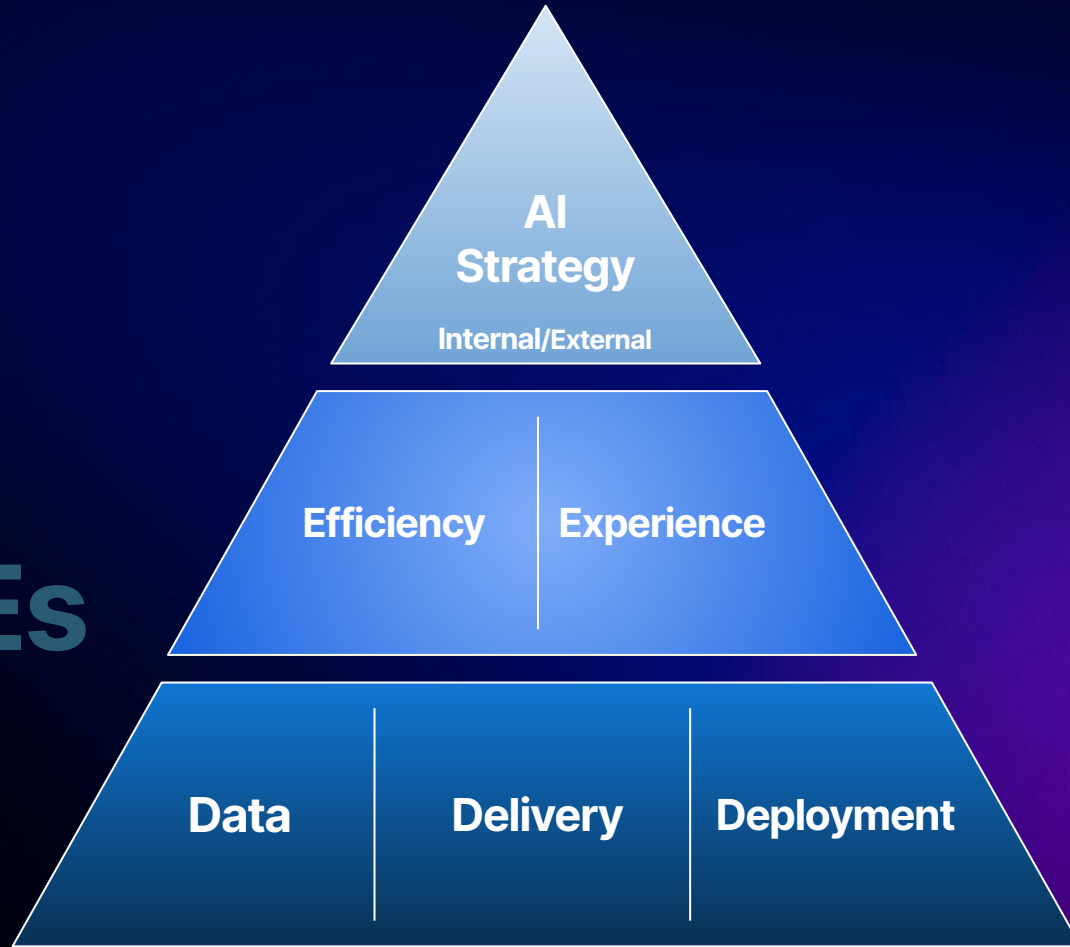


**EMERGE**



2 Es

3 Ds



# The AI Advantage

## Turning Innovation into Real Impact Safely!



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Head of Product (AI), Eltropy  
[Moderator]



Craig McLaughlin  
CEO  
Finalytics.ai



Ron Winter  
CTO  
InRoads CU



Michael Brine  
VP of Member Services  
Trustone Financial CU



Kate Alter  
AVP Ent. Applications  
Trustone Financial CU



Buddy Bennett  
COO  
Cyprus CU

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