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Practical AI fi financial adviser an client insights

Harbour Think Tank, Caribbean AI Association, under the leadership of Adrian Dunkley | 2026-11-11

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Weh di test fi cover

Start wid education, public fact questions an approved documents. Keep source facts, calculation an adviser judgement apart. Check permission an dates before using client records. Di adviser own di recommendation.

Ten use case fi test

01. Meeting brief. Pull together purpose, permitted facts an open questions. Supervising adviser check sources an missing facts. Test ten practice files against an adviser’s reference brief. Block access across clients.

02. Portfolio statement. Explain holding, charge an period from di actual statement. Operations reconcile amount an check no fee drop out. One person check amounts an another check di wording. Ask di reader fi explain di result back.

03. Short lesson. Build examples an questions round one financial concept. Learning lead correct error an test understanding. Use equal-difficulty questions before an after. Ask di learner fi explain in their own words.

04. Suitability evidence. Organise documents an flag missing or stale evidence. Compliance check gaps. Di assistant cannot decide if a product fit di person. Plant known omissions. Count missed gaps separately from false flags saying current.

05. Fact question. Bound di question an show di passage an date. Research lead check it support di answer or hold di answer back. Give primary sources priority an include questions weh require abstention.

06. Scenario discussion. State starting figures an assumptions. Use a checked calculator. Adviser verify di numbers an explain dem illustrative. Vary one input at a time. Wid zero change di result must equal di starting amount.

07. Meeting notes. Separate suggestions, accepted commitments an owners. Adviser check every action against approved notes before confirming. Compare wid a human decision record showing owner, date an source passage.

08. Rehearse a difficult conversation using practice cases. Training lead check accuracy, advice boundary an whether di trainee escalate properly. Observe another conversation without di assistant fi test behaviour.

09. Review agenda. Use changes di client or records confirm. Supervisor check missed issues an reject unsupported changes. Use di last approved record an a reference agenda fi count unsupported changes an missed topics.

10. Plain document. Restate approved text an keep fee, conditions an exceptions. Document owner check it against di original clause. Map every statement to di source clause an ask di reader fi explain it back.

Di 90-day test

Day 1–15: pick one task. Name di owner an who can stop di test. Write down di approved source, access, time an error inna di work now. Day 16–45: test hard case an record weh disagree. Check every output an keep di test separate from live work.

Day 46–75: compare like task wid like task. Count di time fi prepare, check an fix. Day 76–90: look pon di serious error dem an decide fi widen, change or stop. Di think tank propose di workflow an priority dem. Dem never measure result from a company rollout. Di full English paper give di process, duty table, checks an source notes.

Suos dem

[1] Caribbean AI Association. Think Tanks. Harbour: economy, work and enterprise. Accessed 26 October 2026.

[2] Hope Caribbean Company Limited for Bank of Jamaica. 2023. National Financial Inclusion – Demand Side Study. Final report, 30 November. Methodology pages 20–29; Figure 2 and definitions, page 37.

[3] Financial Services Commission, Jamaica. 2020. Market Conduct Guidelines for Securities Dealers. SR-GUID-20/01-0026, 31 January. Sections 2, 8–10; effective date 1 May 2020.

[4] International Organization of Securities Commissions. 2021. The use of artificial intelligence and machine learning by market intermediaries and asset managers. Final report FR06/2021, September, pages 2–3.

[5] Office of the Information Commissioner, Jamaica. Data Protection Standards. Accessed 26 October 2026.

[6] Financial Services Commission, Jamaica. 2020. Trudi-Ann Thompson: Before You Invest, Understand the Basics of Investing. Webpage text, 20 August; embedded video not relied upon.

[7] Agent Skills. Agent Skills Overview. Accessed 10 November 2026.

Dis short edishan go wid di full orijinal ina Inglish.

Inglish edishan (PDF)