WEBINAR

Enterprise strategies for agentic AI adoption in 2026 and beyond

Key takeaways

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Introduction

As we enter a new year, one key theme from 2025 will persist – the growing integration of AI within financial services. However, 2026 marks a pivotal shift, as AI evolves beyond basic chat interactions and simple automation to the rise of sophisticated autonomous decision-making agents. The question is no longer whether to adopt AI, but how to implement it effectively at scale.

In the *Enterprise strategies for agentic AI adoption in 2026 and beyond* webinar, available now on demand, industry experts from Vertesia, First Eagle Investments and Mercury Financial share valuable insights on how financial service providers worldwide can successfully deploy these advanced technologies across their enterprises.

Discussion points:

- The key differences between agentic AI and traditional AI.
- The current agentic AI use cases in financial services delivering the highest ROI and fastest user adoption rates.
- How financial services firms can effectively manage risk and ensure compliance when implementing autonomous AI decision-making systems.
- The steps senior IT leaders should take to prepare their data, infrastructure and institutional knowledge bases to maximise agentic AI effectiveness.
- How companies can measure success and determine readiness when moving from pilot to full-scale agentic AI deployment.
- What partnerships or vendor relationships are critical for successful agentic AI implementation.
- The key trends shaping the future of agentic AI in 2026 and beyond.

Watch the webinar on demand now

The *Enterprise strategies for agentic AI adoption in 2026 and beyond* webinar is available to watch now on demand. You can watch the full webinar by clicking here.

Who should watch:

- Senior IT leaders overseeing technological innovation within financial services.
- CTOs and CIOs responsible for delivering strategic technology initiatives in banking, investment management and wealth management.
- Professionals seeking insights into scaling advanced AI solutions across their organisations.
- Technology decision-makers shaping digital transformation strategies in private equity firms.

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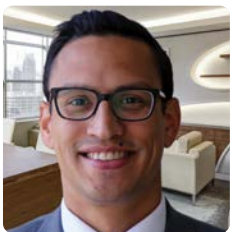
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Webinar speakers

Tim Hood, SVP, EMEA, Vertesia

Tim is senior vice president, EMEA, at Vertesia, where he guides clients through the adoption of next-generation enterprise software solutions. With more than two decades of leadership across Hyland Software, Kofax and other global providers, Tim has a proven track record of helping organisations simplify complexity and build long-term digital strategies. His expertise spans content services, process automation and AI-driven platforms, always with a focus on practical and measurable outcomes. Tim is known for fostering trusted partnerships, listening to customer needs and ensuring technology delivers measurable value. He combines strategic insight with a collaborative approach, supporting clients as they navigate change with confidence.

Mark W. Totten, director, US Wealth Solutions, First Eagle Investments

Mark focuses on advancing the firm's engagement with financial advisors and wealth management platforms across the US. A member of First Eagle's AI Innovation Council, Mark helps guide the firm's exploration and integration of emerging technologies to enhance client experience and operational efficiency. Mark joined First Eagle in 2015 and brings more than 17 years of investment industry experience, including prior roles at BlackRock and Wells Fargo, with a concentration on the US wealth market. Mark earned his undergraduate degree from James Madison University and recently completed the Executive Education Program at Columbia Business School.

Michael Finkelstein, director, strategic initiatives & operations, Mercury Financial

Michael is a senior operator and transformation leader with more than 20 years of experience driving strategic initiatives, operational scalability and governance across financial services and technology organisations. Michael's perspective on AI comes from the operator's side, not as a technologist, but as a fintech leader who understands how transformation actually lands. He focuses on translating AI vision into practical adoption, compliance confidence and measurable ROI. His career includes leadership roles at fintech lender Mercury Financial, Chubb Insurance and Fortune 100 firms where he built governance frameworks, led merger integration and delivered large-scale transformation outcomes. He holds an MBA from NYU's Stern School of Business and a B.S. in Economics from The Wharton School, University of Pennsylvania.

Cameron Emanuel-Burns, reporter, FinTech Futures

Cameron Emanuel-Burns, a reporter at *FinTech Futures*, is dedicated to enhancing the accessibility of fintech for a broader audience. He has contributed articles to various media platforms and possesses a strong interest in all aspects of fintech. Prior to his involvement in the financial industry, Cameron worked in the podcasting field, where he held editorial, hosting and production positions for renowned production companies, covering diverse topics. With a research master's degree in conflict analysis, he conducted a study on the influence of anti-refugee policies on extremism.

Key takeaways from the webinar

In this webinar presented by *FinTech Futures* and Vertesia, industry experts Tim Hood SVP, EMEA at Vertesia, Mark W. Totten, director of US Wealth Solutions at First Eagle Investments, and Michael Finkelstein, director of strategic initiatives and operations at Mercury Financial, explored how financial service providers worldwide can successfully deploy agentic AI across their enterprises.

Here we highlight the key insights from the discussion, focusing on the importance of overcoming cultural resistance to strengthen AI transformation strategies and exploring the most impactful agentic AI use cases driving significant return on investment in financial services.

The session also included predictions for AI advancements in 2026, with the speakers identifying opportunities for the technology to boost productivity while cautioning regulators against actions that could hinder its adoption.

Agentic AI vs traditional AI

To begin the session, Hood discussed the evolution of artificial intelligence and highlighted how its latest strand, agentic AI, differs from traditional AI. He provided examples of what he referred to as a "productivity assistant", such as ChatGPT and Copilot, as examples of conventional AI – "where you can ask questions, give certain tasks, but it needs a lot of help along the way… You are guiding it and determining how it behaves".
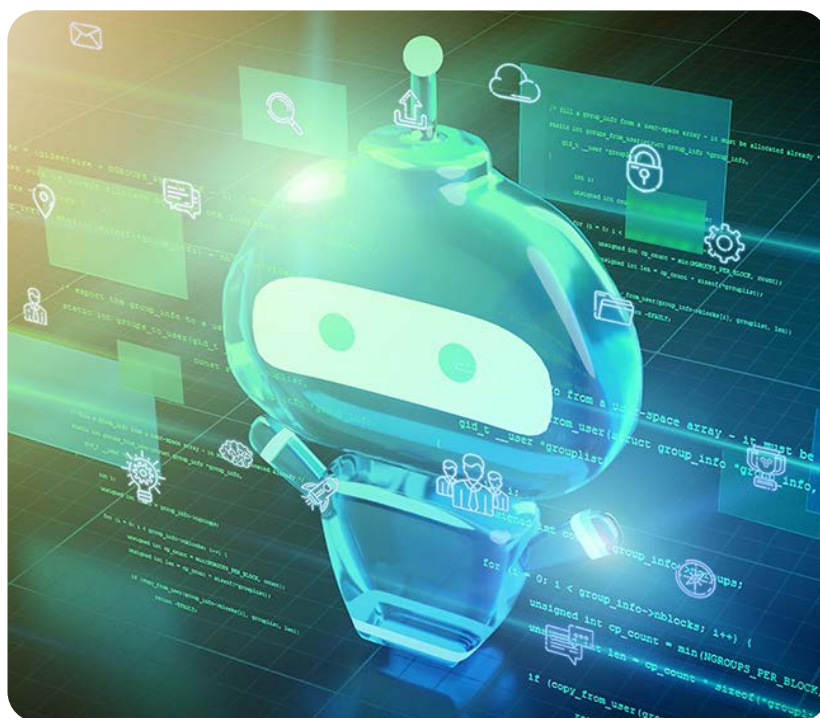
In contrast, Hood described agentic AI as being centred on enabling agents to "autonomously work to deliver business outcomes, act independently and to some degree, do some reasoning to work out how they are going to achieve that task".

> " *If you can do a lot more of those manual tasks more quickly and effectively, it allows businesses to focus more on higher-value output tasks.* "
>
> *Tim Hood, Vertesia*

He noted the tech's potential benefits for financial services and their competitiveness, emphasising that it can help companies scale more efficiently. "If you can do a lot more of those manual tasks more quickly and effectively, it allows businesses to focus more on higher-value output tasks," he explained.

When discussing which agentic AI use cases are currently delivering the highest ROI and fastest user adoption rates in financial services, Totten revealed that his firm has implemented multiple AI-powered tools, including an AI chatbot functionality – which he described as the business' "Jarvis" from the Iron Man movies – as well as AI sales enablement tools.

Meanwhile, Finkelstein stated: "Where we see the potential for the fastest ROI is functions where people are drowning in repetitive works." He cited examples such as fraud operations teams and customer support units, where increased automation can significantly reduce workloads.

He further explained: "In all these cases, the key is that agents can succeed quickly because they start with human in the loop oversight, building trust way before we get to full autonomy."

Successful AI implementation strategies

When reflecting on the learnings from previous efforts to integrate emerging technologies into company workflows, Finkelstein remarked: "The biggest lesson is that operational alignment matters more than technical readiness."

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>
> Michael Finkelstein, Mercury Financial

He emphasised the importance of involving operations, risk, compliance, IT and legal teams at the ideation stage, noting that this collaboration is crucial for accelerating the implementation process.

Hood added that, given the rapid pace of market and technological advancements in financial services, "a lot of organisations are finding that they are starting down a particular route [when looking to implement their AI strategy] but as they haven't done it before they are having to learn as they go along".

He suggested that partnering with established platform providers in the AI space can help firms avoid unforeseen pitfalls. Hood also underscored the need for businesses to remain "agile" and be prepared to pivot, stating that adaptability is essential for "keeping up with what is changing from a tech perspective".

On addressing cultural resistance and stakeholder concerns during agentic AI implementation, Finkelstein noted: "You can't force adoption, you have to earn it." He recommended starting with "smaller, safer copilots to build trust and familiarity", adding that "early wins that can show AI drafting and summarising, prefilling and collecting, but where humans are still deciding" can help build confidence and acceptance.

Totten contributed by highlighting the importance of educating staff on how AI can ease job demands, suggesting firms should demonstrate examples and predicted time savings to alleviate concerns. He also stressed the value of establishing a "continuous feedback loop" to further reduce resistance.

Looking ahead to 2026 and beyond

When examining what financial services leaders should focus on as we enter 2026, Finkelstein remarked: "I find it really clear that copilots that today perform one step in the process will likely in 24 to 36 months from now be fully autonomous agents that execute end-to-end work. We have to start imagining a near future where AI doesn't just assist people but truly collaborates with them."

On the regulatory side, Finkelstein emphasised the need for regulators to find ways to accelerate adoption rather than hinder progress.

Hood noted the difficulty in predicting the next major advancements in AI but suggested there will likely be an arms race for large language models (LLMs). He stressed that AI needs to improve its "reasoning" capabilities to handle "truly" agentic tasks, such as verifying information, analysing additional data and "comparing and contrasting data points" to better mimic human decision-making processes.

> **We are just at the start of the game. We definitely want to continue on this path because it is working.**
>
> *Mark W. Totten, First Eagle Investments*

Finally, Totten stated: "The more we use these tools, the more proprietary data these chatbots and LLMs receive, the better their suggestions will become."

He concluded: "We are just at the start of the game. We definitely want to continue on this path because it is working. By [the end of] 2026, we will see sharper, more accurate and more productive use cases, which will continue to help our team and save hours of manual labour."

In summary

- Agentic AI represents a significant evolution from earlier versions of AI, which required extensive prompts and guidance to complete tasks. Unlike its previous iterations, agentic AI is capable of operating autonomously to deliver business outcomes. This new technology offers companies the potential to scale operations more rapidly.

- The use cases delivering the highest ROI are those that eliminate manual and repetitive tasks, such as fraud detection and customer support functions. Additionally, sales teams are benefiting from AI tools that can prepare pitches and provide background information on potential clients, streamlining their workflows.

- Industry players should prepare for autonomous agents capable of handling day-to-day tasks by the end of 2027. Regulators, meanwhile, should focus on fostering innovation and ensuring they do not hinder the adoption of this emerging technology.

- When implementing an AI strategy, firms should consider partnering with established providers in the AI field to avoid unforeseen challenges. It is also critical to engage all departments within the organisation during the ideation phase, as cross-functional collaboration is essential for speeding up implementation.

- Beginning with smaller, more contained, AI copilots can help foster trust and familiarity, easing cultural resistance to the technology. Demonstrating how AI can reduce workloads – such as collecting data, drafting and summarising documents, and pre-filling forms – can encourage acceptance across the enterprise.

About Vertesia

Vertesia is a SaaS platform purpose-built to accelerate the development and deployment of custom generative AI (GenAI) applications, agents and services. Combining enterprise-grade infrastructure with a low-code environment, Vertesia helps organisations overcome the complexity and cost typically associated with deploying GenAI at scale – reducing time to value while enhancing output accuracy and enabling comprehensive governance. Featuring an API-first architecture, the platform provides flexible system integration, intelligent content preparation and powerful tooling for autonomous agents. Vertesia transforms GenAI initiatives from one-off experiments into strategic competencies.
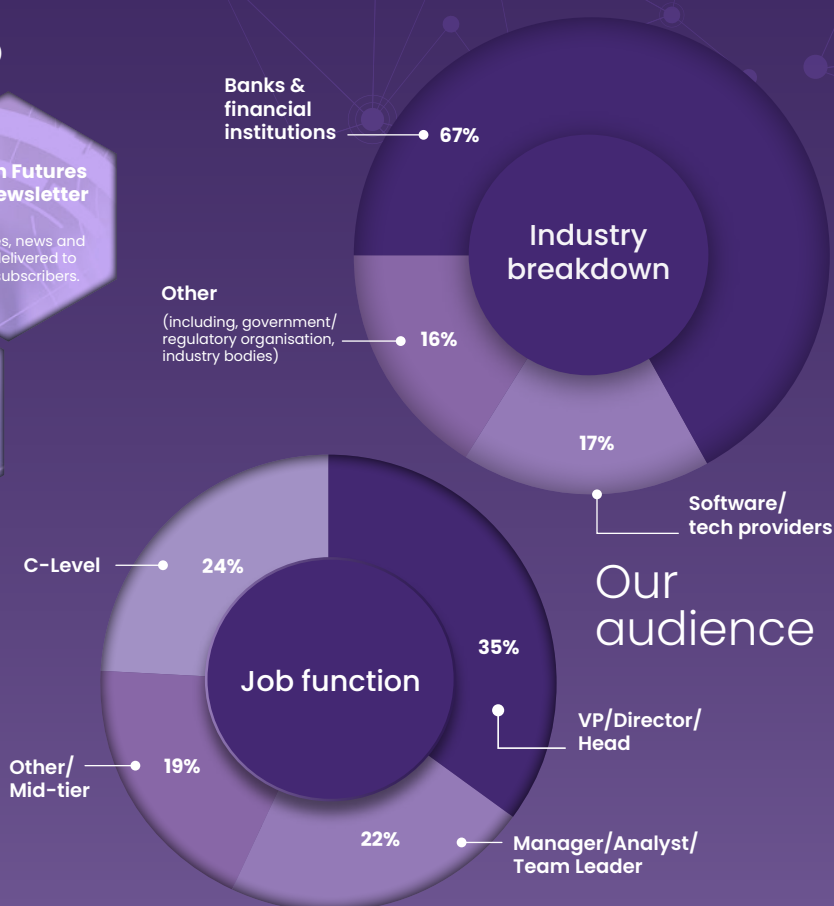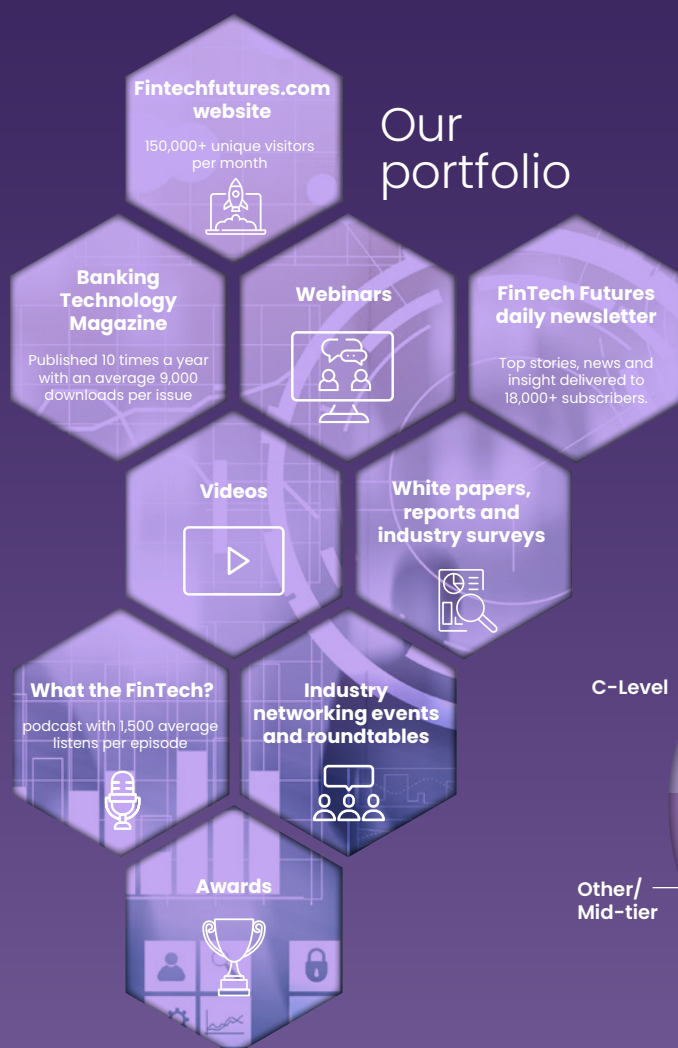
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