

Financial Services Leaders Gather in New York to Examine the Realities of Agentic AI in Enterprise Operations

For industry's most regulated institutions, the question has shifted from whether to adopt Agentic AI to what it actually takes to make it work.

NEW YORK, NY, UNITED STATES, April 28, 2026 /EINPresswire.com/ -- Senior executives representing some of the world's top Wall Street banks and financial services firms gathered at the Harvard Club in New York City on April 16 for [USEReady's 3rd Breakfast with Agents](#) session, co-hosted with [Elementum](#). Leaders from capital markets, corporate banking, procurement, and enterprise operations spent the morning working through a single, consequential question: what does responsible Agentic AI deployment actually look like inside institutions where governance is non-negotiable, and the cost of failure is measured in regulatory consequence?



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The session made one thing clear: the hard work of Agentic AI in financial services happens long before any model is deployed. It happens in the boardroom, in the data architecture decisions made years earlier, and in the willingness of senior leadership to stay accountable through implementation. For institutions operating under the scrutiny of regulators and the expectations of global markets, that bar is higher than in almost any other industry.

It is a pattern USEReady has watched play out across every sector it works in. In financial services, the stakes are simply higher.

"We have worked with enough organizations to know that the ones who succeed are not the ones with the biggest AI budgets. They are the ones who ask the hard questions first – about their data, their processes, and whether their leadership is truly aligned. In financial services, you do not get to learn those lessons twice," said Uday Hegde, Co-founder and CEO, USEReady.

An EVP & CIO for the largest independent broker-dealer in the US opened the day with a practitioner's perspective on building AI-enabled systems at enterprise scale – and what it

demands of organizations that cannot afford operational failure.

"At our scale, the margin for error is close to zero. AI has to work inside the controls, the architecture, and the institutional culture that already exist, not around them. Operational readiness is not a prerequisite you check off before deployment. It is an ongoing commitment," the executive noted.

Andrew Bennett, Chief Marketing Officer at Elementum, addressed how Agentic AI is reshaping workflows across HR, finance, accounting, and procurement – drawing on live enterprise examples to show where the technology is generating measurable impact and what organizations need in place to sustain it.

"The organizations getting real returns from AI agents are not always the ones with the most advanced models. More often, they are the ones that have done the work on process clarity and data structure before the technology arrives. The platform accelerates what is already coherent. It cannot substitute for coherence that does not exist," noted Bennett.

A panel discussion brought together Bob Rosetta, former MD and Global CPO at Citigroup, Ruchi Sharma, former MD at Vyrisk and Industry Advisor for USEReady and the global CIO of one of the world's largest financial institutions. The conversation covered governance architecture, data readiness, regulatory complexity, and the organizational conditions that separate successful AI deployments from stalled ones.

"Governance is not a speed bump. In a regulated financial institution, every AI deployment has to be explainable, auditable, and defensible – to internal stakeholders and to regulators. Organizations that treat governance as a compliance formality are taking on risks they cannot fully quantify," emphasized Rosetta during the discussion.

The session also saw questions reflecting the urgency executives are feeling around deployment timelines and accountability frameworks.



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Wall Street leaders examine what it takes to operationalize Agentic AI in regulated environments at USEReady's 3rd Breakfast with Agents session.

The morning concluded with a Show & Tell session led by Jeremy Walsh, Global Head of Strategic Enablement and Partners at Elementum. Walsh walked the room through live use cases spanning finance, accounting, operations, and procurement – illustrating the art of the possible and giving attendees a clear-eyed view of what Agentic AI looks like running inside real enterprise workflows.

Attendee feedback for the gathering was overwhelming, with many expressing interest in future sessions and bringing peers into the series. As the Breakfast with Agents series moves into its next phase, USEReady will continue bringing together senior practitioners across industries and geographies to work through what AI transformation looks like when it is built to last.

The New York session followed closely on USEReady's recognition as a Seasoned Vendor in AIM Research's PeMa Quadrant 2026 for Top Generative AI Service Providers, an independent validation of its standing as a production-focused Agentic AI partner for enterprises navigating complex, high-stakes transformations.

About Elementum

Elementum is the open orchestration platform for enterprise AI workflows. Its patented Zero Persistence architecture runs natively inside your data cloud — enabling instant automation without data movement, replication, or vendor lock-in. Fully pre-integrated with leading AI, ML, and LLM providers, Elementum combines AI reasoning, human approvals, and deterministic policy rules in a single orchestration layer. Industry leaders including Sanofi, Under Armour, and Snowflake use Elementum to transform operations and increase productivity. Elementum meets SOC 2 Type II and ISO 27001 standards, with Concept to Production in under 30 days. Learn more at elementum.ai.

About USEReady

Founded in 2011 in New York, USEReady empowers enterprises with cutting-edge AI and Data Analytics solutions to drive intelligent, autonomous transformation. As a trusted partner to Fortune 500 organizations, USEReady delivers scalable, high-impact solutions through its expertise in Agentic AI, Decision Intelligence, Cloud Data Engineering, and Analytics Modernization. Leveraging proprietary frameworks, platforms and accelerators, along with industry protocols, USEReady enables customers across Manufacturing, Financial Services, Healthcare, Retail, Energy, Travel & Hospitality and Public Sector to achieve measurable outcomes in an agentic world. For more information, visit useready.com.

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