

# MEANINGFUL AI LAUNCHES FINANCIAL INSTITUTIONS PRACTICE, NAMES LEE LONG AS STRATEGIC PARTNER

*Veteran financial services executive to lead AI work built for the security, compliance, and trust the industry demands*

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*Matt McKenzie, CEO of Meaningful AI*

[Meaningful AI](#) today announced the launch of its Financial Institutions practice and the appointment of Lee Long as Strategic Partner, Financial Institutions. The practice is built for banks, credit unions, and financial service providers that want to adopt AI without compromising the security, compliance, and customer trust their business depends on.

The practice formalizes work Meaningful AI is already delivering. The firm is embedded in active [financial institution](#) engagements that span AI strategy, use case delivery, and governance.

Financial institutions operate under a different set of rules than most industries. Every AI use case has to stand up to security review, regulatory compliance, and internal governance before it ever reaches a customer or a member. Meaningful AI's approach starts there. The firm designs AI that meets the standards regulated institutions are held to, including the option to keep sensitive data inside the institution's own environment, so adoption never outpaces the controls that protect it.

From that foundation, the practice helps institutions put AI to work where it matters most. That includes sharpening customer experience and proactive outreach, compressing lending and underwriting cycles while strengthening compliance and fraud detection, and freeing finance and treasury teams to analyze results instead of assembling them. What ties the work together is a clear conviction. AI should give these institutions back the time and clarity to do what they were built to do, which is serve as trusted advisors to the people and businesses who rely on

them.

Meaningful AI pairs deep AI capability with hands-on operational experience. That combination is what lets the firm change how work actually gets done rather than hand teams one more tool to learn.

“This industry doesn’t get to experiment loosely with AI.” said Matt McKenzie, CEO of Meaningful AI. “Every use case has to clear security, compliance, and governance before it reaches a single member. That is the standard we build to. Lee has spent her career inside financial services. She knows these institutions were built to be trusted advisors. She also knows how to use AI to return them to that role instead of burying it under more systems. Putting her name on this practice tells our clients who is accountable for getting it right.”

Long brings the perspective the work requires. Most recently she served as Chief Experience Officer at HC3, a Birmingham-based customer communications company serving financial institutions, where she led client experience, operational alignment, and strategic growth. She joined HC3 through its acquisition of Banc Statements, Inc., where she served as Chief Operating Officer. That path has given her an inside-out understanding of how banks, credit unions, and their service providers actually operate.

“I’ve spent years inside this industry, and the institutions that earn lasting loyalty are the ones their customers trust,” Long said. “AI can strengthen that trust or quietly erode it. The difference comes down to whether security, compliance, and the customer relationship are built in from the start or bolted on at the end. My job is to make sure they are built in. I joined Meaningful AI because the firm treats that discipline as the foundation of every engagement.”

In 2024, Long was named a Birmingham Business Journal C-Suite Award honoree, recognition reserved for chief-level leaders making a measurable impact on their companies and their communities.

The Financial Institutions practice is active today and expanding. Institutions evaluating AI can reach the team at [bemeaningful.ai](https://bemeaningful.ai)

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About Meaningful AI: Meaningful AI is an advisory and consulting firm that helps organizations harness artificial intelligence to drive smarter business decisions, stronger teams, and



Lee Long, Strategic Partner, Financial Institutions, Meaningful AI

sustainable growth. With deep expertise across financial institutions, HR, operations, and organizational strategy, Meaningful AI partners with leaders to design and implement AI solutions that are practical, ethical, and built for the real world. With offices in Atlanta and Birmingham, the firm works with clients across industries to make AI not only accessible, but meaningful.

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