



# EMBRACING AI

WITH SUSAN GUTHRIE

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Chartered Financial  
Divorce Specialists

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# GET THE MATERIALS

[HTTPS://SUSANEGUTHRIE.COM/AFDS](https://susaneguthrie.com/afds)



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CHAIR ABA SECTION OF DISPUTE RESOLUTION








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## TODAY'S PROGRAM

### Some Best Practices with AI

It's not like anything you have used before, but we treat it like an old friend. We need to retrain our brain!

### Live Demos of Practical Applications

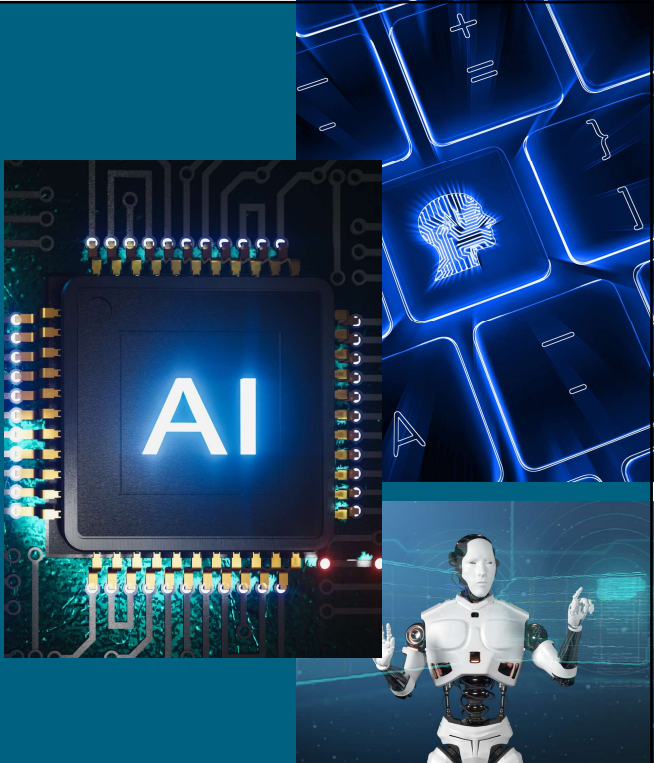
- Business and Marketing Support
- Curated Client Outreach
- Option Generation and Brainstorming
- Drafting and Follow Up

### Financial AI Tools

AI Tools specifically created to support financial professionals

### Q&A and Final Takeaways

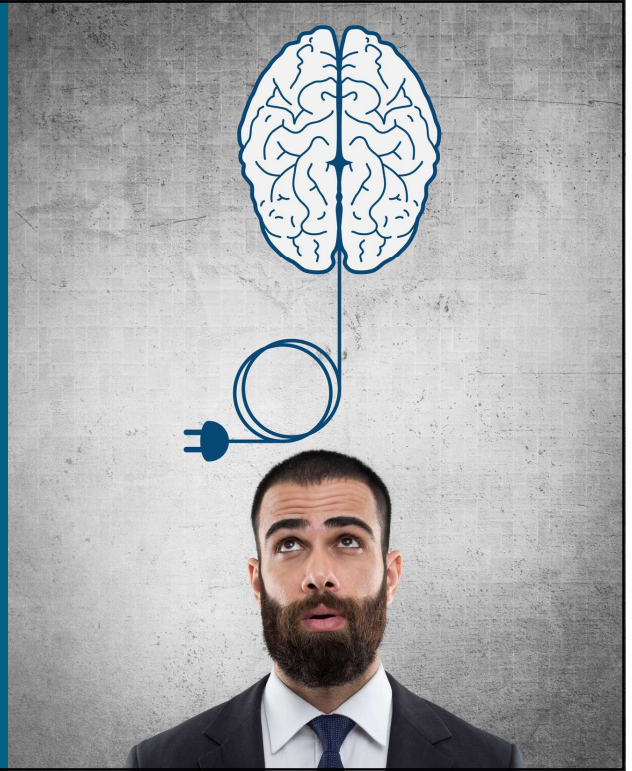
Where to go from here and what does this mean for divorce professionals and entrepreneurs.



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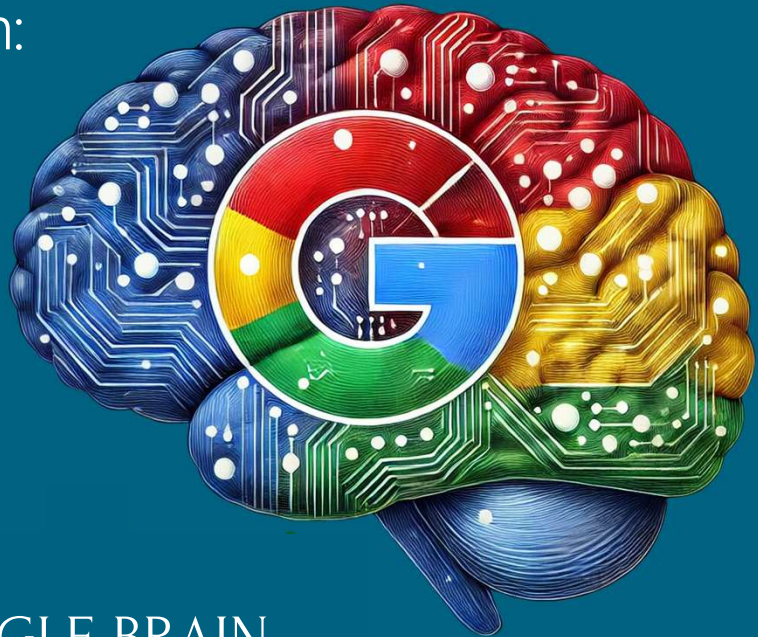
## FIRST THINGS FIRST

We need to  
retrain our brains!



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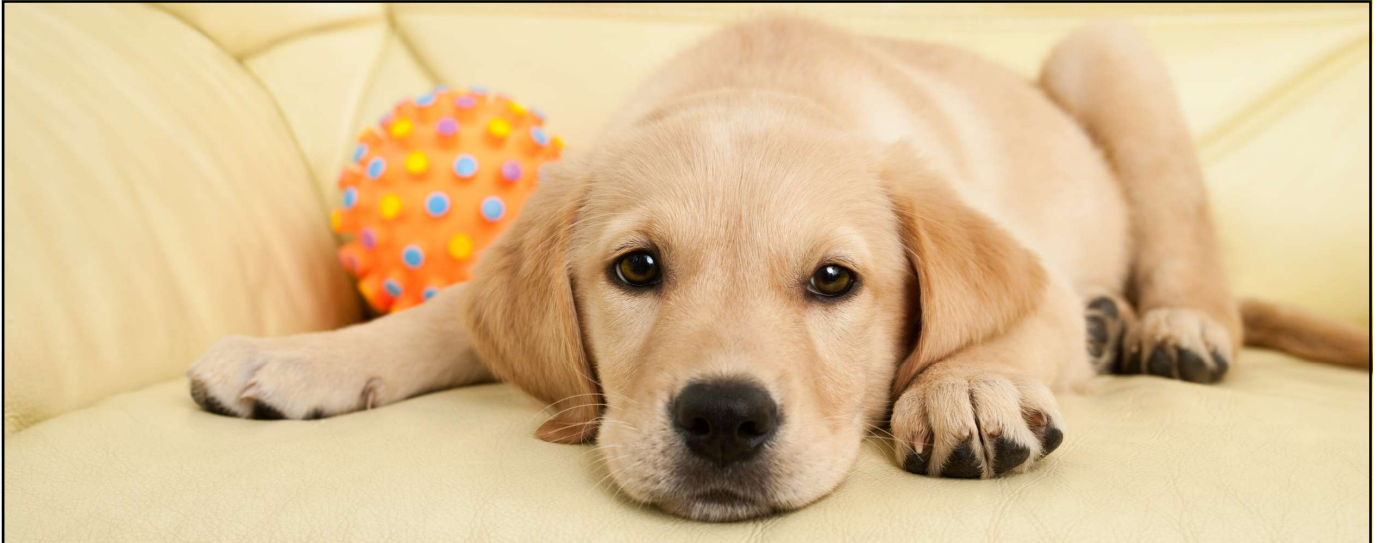
Here's the Problem:



WE ALL HAVE GOOGLE BRAIN

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## GOOGLE IS LIKE A LABRADOR RETRIEVER

You ask a question (throw the ball) and Google (the dog) returns your specific answer (the ball.)

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Give me 5 ways that I  
can grow my business.



A GOOGLE SEARCH PROMPT

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AI TOOLS LIKE CHATGPT ARE MORE LIKE THE WISE OLD, WELL-READ OWL THAT YOU SIT DOWN WITH FOR A CHAT ON A VARIETY OF TOPICS AND WHO WILL HELP GUIDE YOU AND SUPPORT YOU IN YOUR INTELLECTUAL QUEST

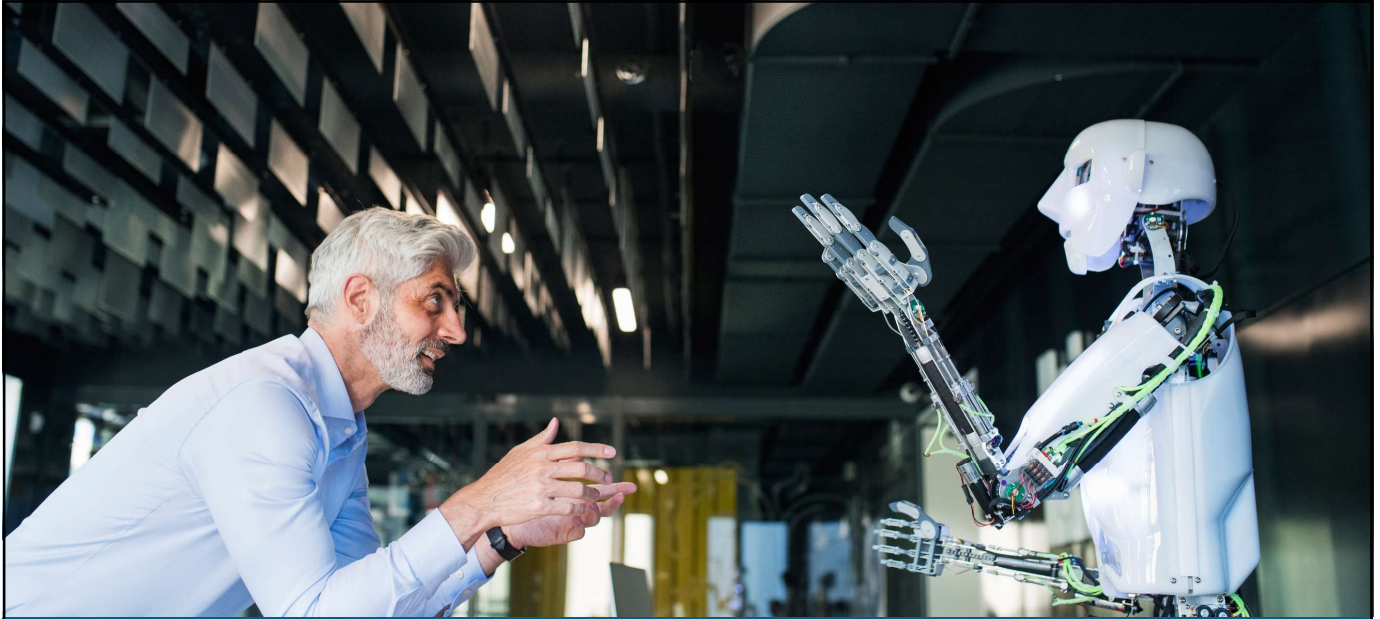
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I'm a financial divorce specialist who wants to get more clients. I already have a website, a blog, and a LinkedIn profile, but I'm not sure how to use them effectively. Please help me come up with ideas to promote my practice in a way that feels authentic and helpful to people going through divorce. I'd love tips on what to post, how often, and any tools that can make this easier for me.



AN AI TOOL SEARCH PROMPT

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AI TOOLS ARE YOUR THINKING PARTNER  
It is a creative process between two collaborative partners

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## BEST PRACTICES WHEN USING AI TOOLS PROFESSIONALLY

- Protect Client Confidentiality
  - Never input sensitive or personally identifiable client data into public AI tools unless you've verified security and compliance. Use anonymized data whenever possible.



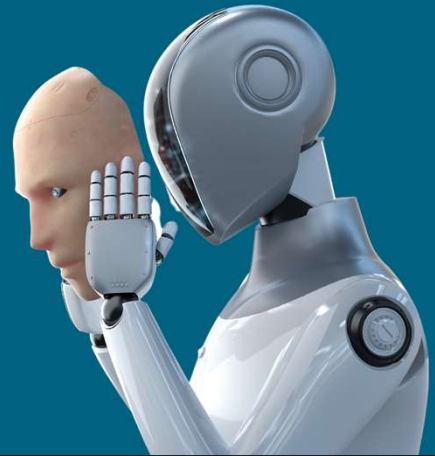
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## BEST PRACTICES WHEN USING AI TOOLS PROFESSIONALLY

### Verify and Interpret, Don't Automate Judgment

- Use AI to summarize documents or run projections, but always apply your professional expertise to interpret results and make recommendations.



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## BEST PRACTICES WHEN USING AI TOOLS PROFESSIONALLY

### Use AI to Educate, Not Just Automate

- Create simple, client-facing explanations (e.g., plain-language summaries or FAQs) using AI to help demystify financial concepts and build trust.

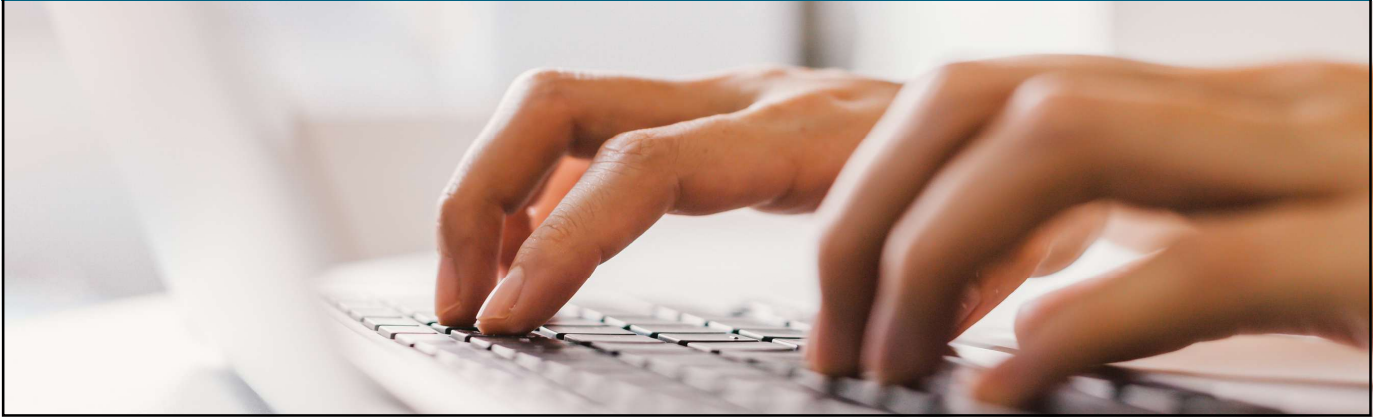


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## BEST PRACTICES WHEN USING AI TOOLS PROFESSIONALLY

### Start with Specific, Clear Prompts

- ▶ The more specific your question, the better the response. For example:  
“Create a checklist for a divorcing client deciding whether to keep the family home.”  
**MAKE IT A CONVERSATION!**



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## BEST PRACTICES WHEN USING AI TOOLS PROFESSIONALLY

### Test and Tweak Before Relying Fully

- ▶ Run parallel versions—your manual version vs. the AI-assisted one—to compare outcomes before fully integrating AI into key workflows.

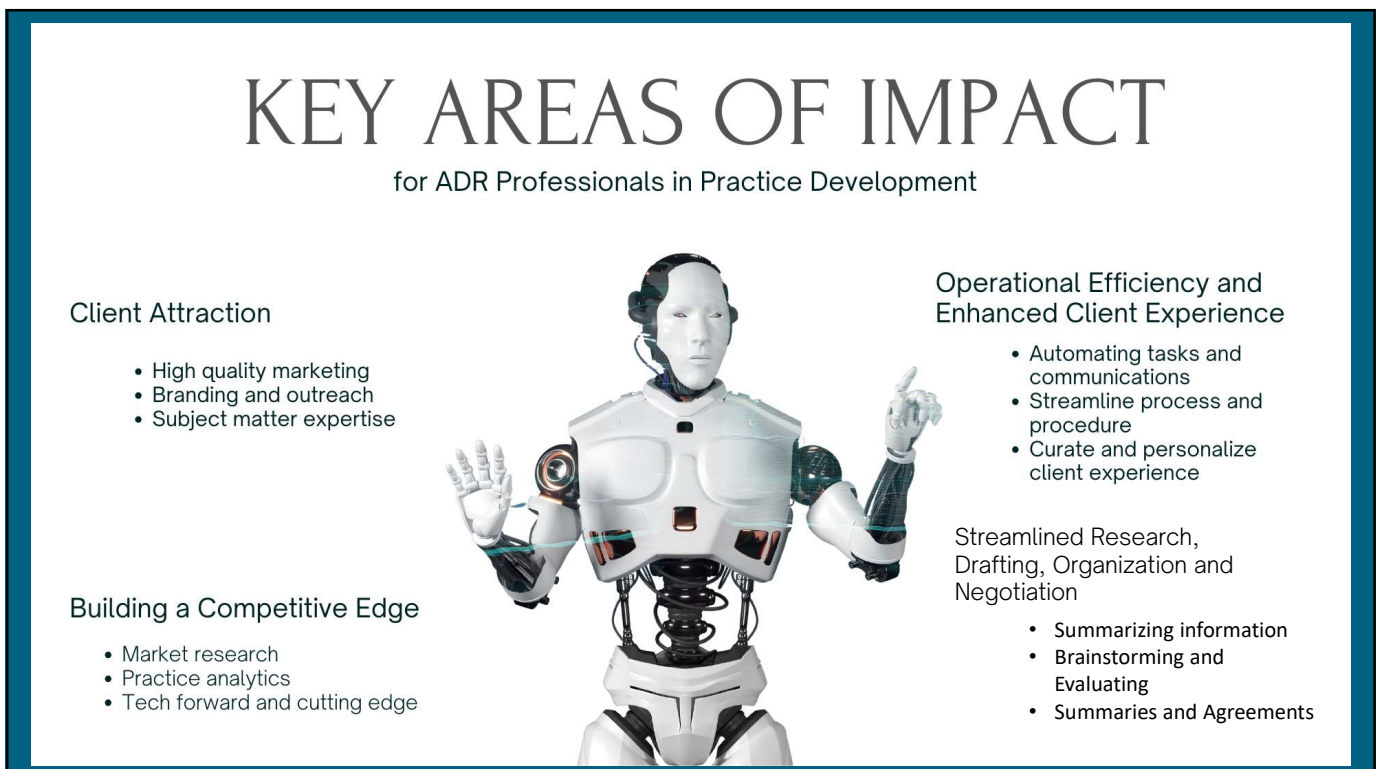


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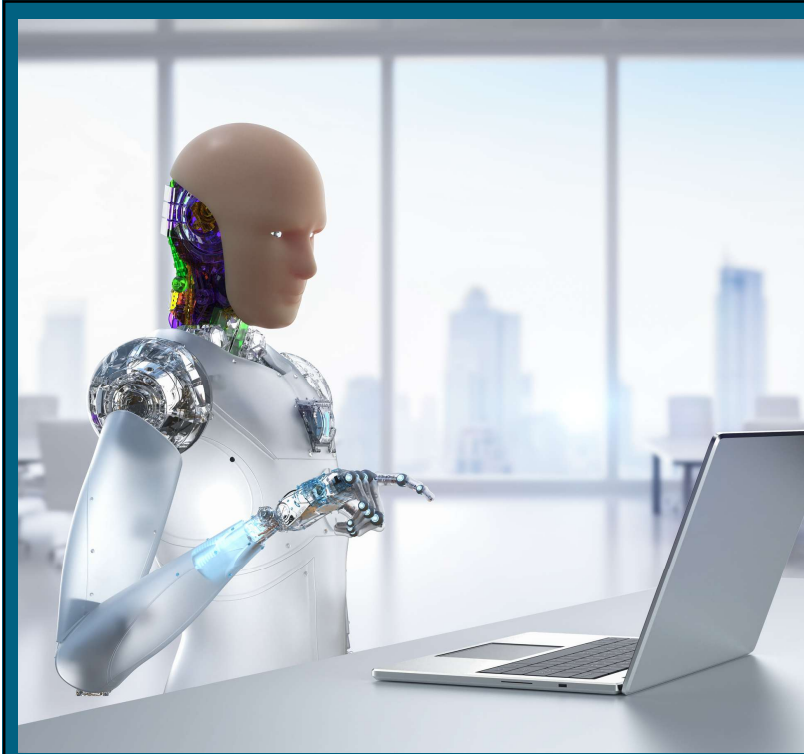




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# DEMOS

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CLAUDE



CHATGPT



Gemini

WHAT ARE THE BEST TOOLS?



**ChatGPT, Gemini and Claude**  
along with Specialty Tools and GPTs

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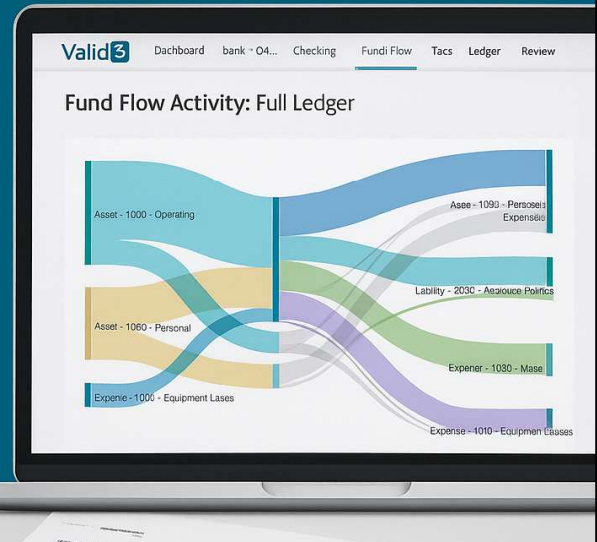
# Introducing Valid8 Financial

## AI Powered Financial Intelligence

- Automated data extraction from accounting systems and financial reports
- Streamline lifestyle analysis, modeling, etc.
- Solutions architected with cutting-edge technology and industry-leading best practices, providing you with unparalleled cloud security.

**VALID8**  
FINANCIAL

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The Rundown AI

[therundown.ai](https://therundown.ai)



**AI for Work**

AI News + Advanced Prompts + Resources for Professionals

[aiforwork.co](https://aiforwork.co)

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The more you use it,  
the more ways you will find to use it.



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# STAY IN TOUCH!

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