

# Financial Analyst

FINANCE · O\*NET 13-2051.00 · FINANCIAL AND INVESTMENT ANALYSTS

SPEND LESS TIME PULLING DATA TOGETHER AND MORE ON THE ANALYSIS THAT PAYS.

## 1 YOUR ROLE TODAY

Financial analysts turn numbers into decisions: models, valuations, forecasts and recommendations. The judgement and the accountability stay with you. The data wrangling, first-pass modelling and write-ups are where AI earns its keep.

### WHAT THE JOB INVOLVES

- Analyse financial data and build models and forecasts.
- Assess the performance of investments, businesses or projects.
- Prepare reports, recommendations and presentations.
- Research economic, industry and company conditions.
- Build and maintain spreadsheets and valuation models.
- Present findings to managers and clients.

### SKILLS THAT MATTER MOST

- Mathematics
- Critical thinking
- Reading comprehension
- Active listening
- Complex problem solving
- Writing

O\*NET job zone: Job Zone 4 — considerable preparation.

## 2 THE FOUR COPILOT TOOLS

<b>COPILOT CHAT</b>	Free, secure chat. Works from the open web and anything you paste or upload. No access to your internal files unless you give it.
<b>M365 COPILOT</b>	Sits inside Word, Excel, PowerPoint, Outlook and Teams. Works on your own emails, files and meetings (only what you already have permission to see).
<b>COPILOT COWORK</b>	You hand over a longer job and it works through the steps, showing progress so you can steer. Good for multi-stage work that used to eat an afternoon.
<b>COPILOT AGENTS</b>	A custom helper you (or IT) set up once to handle a specific, repeatable job — answering a common question, triaging a queue, drafting from a template.

## 3 AI OPPORTUNITY MAP

Where the four tools fit the real work — with a practical example for each.

TASK	BEST TOOL	PRACTICAL EXAMPLE
Build or extend a model in Excel	<b>M365 COPILOT</b>	Ask Copilot to add a scenario, write a formula, or explain what an inherited model is doing.
Summarise a long report or set of accounts	<b>M365 COPILOT</b>	Summarise a 10-K or board pack to the figures and risks that matter.
Research a company or sector	<b>COPILOT CHAT</b>	Get a grounded first read on a market or competitor from public sources, with links to check.
Turn a model into a deck	<b>M365 COPILOT</b>	Draft the slides from your spreadsheet, then refine the story by hand.
Produce the monthly variance pack end to end	<b>COPILOT COWORK</b>	Delegate: pull actuals, compare to budget, draft the commentary, leave it for review.
Sense-check your own commentary	<b>COPILOT CHAT</b>	Ask for the questions a sceptical CFO would ask about your conclusion.

## 4 SKILLS TO BUILD

The AI-literacy habits this role needs.

- Never trusting a number you didn't trace — check every figure AI touches.
- Writing prompts that include the assumption, the period and the format.
- Explaining a model in words so AI (and your reader) can follow it.
- Knowing what must not leave the building, and which surface keeps it inside.

## 5 GETTING STARTED — 3 QUICK WINS THIS WEEK

- ✓ Ask Copilot in Excel to explain or extend a formula you inherited.
- ✓ Summarise one long report to its key figures and risks this week.
- ✓ Draft your next analysis deck from the spreadsheet, then rewrite the narrative.

## 6 GETTING AHEAD — YOUR 90-DAY PLAN

<b>Days 1–30 · Get started</b>	Use Copilot in Excel daily for formulas, checks and scenarios. Summarise every long document before reading it in full.
<b>Days 31–60 · Build the habit</b>	Draft recurring packs in M365 Copilot. Hand the monthly variance pack to Cowork and review rather than build.
<b>Days 61–90 · Get ahead</b>	Template your most repeated analysis as an agent. Keep a checklist for verifying AI-produced figures.

## 7 WHERE TO LEARN NEXT

Four short intro courses, in order. Start at the top.

- 01** Start with Copilot Chat  
The no-risk way in. Ask, draft, summarise, compare. One hour.

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**02** Work inside M365 Copilot  
Use it in the apps you already live in: Outlook, Word, Excel, Teams.

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**03** Delegate with Copilot Cowork  
Hand over the multi-step jobs. Learn to brief, check and steer.

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**04** Build a Copilot Agent  
Turn your most repeated task into a helper that runs itself.

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Sources — Occupation overview: O\*NET 30.2, occupation 13-2051.00 ([oneline.org/link/summary/13-2051.00](https://oneline.org/link/summary/13-2051.00)) and the ESCO occupational profile ([esco.ec.europa.eu](https://esco.ec.europa.eu)). Copilot tool descriptions: Microsoft 365 Copilot and Copilot Cowork product documentation, Microsoft, May 2026. AI mapping and pathways: Craig Stanley Studio. Verify figures and policy against your own systems before acting.

