EPSTEIN INSTITUTE SEMINAR ▪ ISE 651

Leveraging AI in the Financial Technology Industry

ABSTRACT – With self-driving cars ready to hit the road and IBM Watson poised to disrupt the healthcare industry, the pressing topic on the minds of artificial intelligence developers is how to accelerate the development of general intelligence within their own industries. Developing a form of general intelligence requires extensive big data processing and innovation, and a sophisticated set of highly technical, mathematical machine-learning algorithms to analyze streams of real-time data.

Intuit, maker of TurboTax and QuickBooks, is uniquely positioned to push the limits on artificial intelligence technologies within the finance industry. With data from 42 million customers, Intuit has a legacy of introducing new technology to simplify tax and accounting processes, based on a technology and customer-driven approach to innovation. Seeing the AI revolution coming years ago, the company has transformed its vision, data strategy, and data stewardship principles to enable successful AI implementation to improve the customer experience.

Over the last few years, the company has overhauled its tax engine to enable AI innovation using a rule-based system to build a "Tax Knowledge Engine," which provides the foundation for a suite of intelligent systems. At the same time, the company has improved the customer experience using inference engines. These technologies have helped lead to capabilities such as Intelligent Error Detection, Smart Reminders, and ExplainWhy, which provides personalized explanations behind deductions, credits, and tax refunds. The result has accelerated tax filing time by 40% for some customers.

In this talk, Yao Morin will cover Intuit's AI journey, and its impact on the financial industry. She'll share the steps the company has taken so far, as well the company's vision to build general intelligence in the financial industry.

Dr. Yao Morin
Data Science Leader
Intuit Consumer Group

SPEAKER BIO – Dr. Yao Morin is the Data Science Leader for Intuit Consumer Group. She manages a large team of Data Scientists and Machine Learning Software Engineers with a focus on leveraging Artificial Intelligence and Machine Learning in financial products. She was the key driver for the wildly successful application of dynamic and responsive product personalization in Turbotax, Turbo, and Mint and the adoption of data driven personalization experience throughout Intuit. Yao obtained her Ph.D. in Electrical Engineering from the University of Minnesota. She is an active public speaker in innovative data science applications and data driven personalized experience and the author of multiple academic papers and patents.

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