The Road to AI:

The Financial Sector Needs to Avoid Potholes

In the journey to AI innovation, financial services companies must balance speed with control.

Strong AI adoption, with top down pressure

97% of financial services organizations have started their AI journey

62% have selected managed AI apps

54% are building private AI apps

26% are adopting AI agents

58% experience boardroom pressure to rush adoption

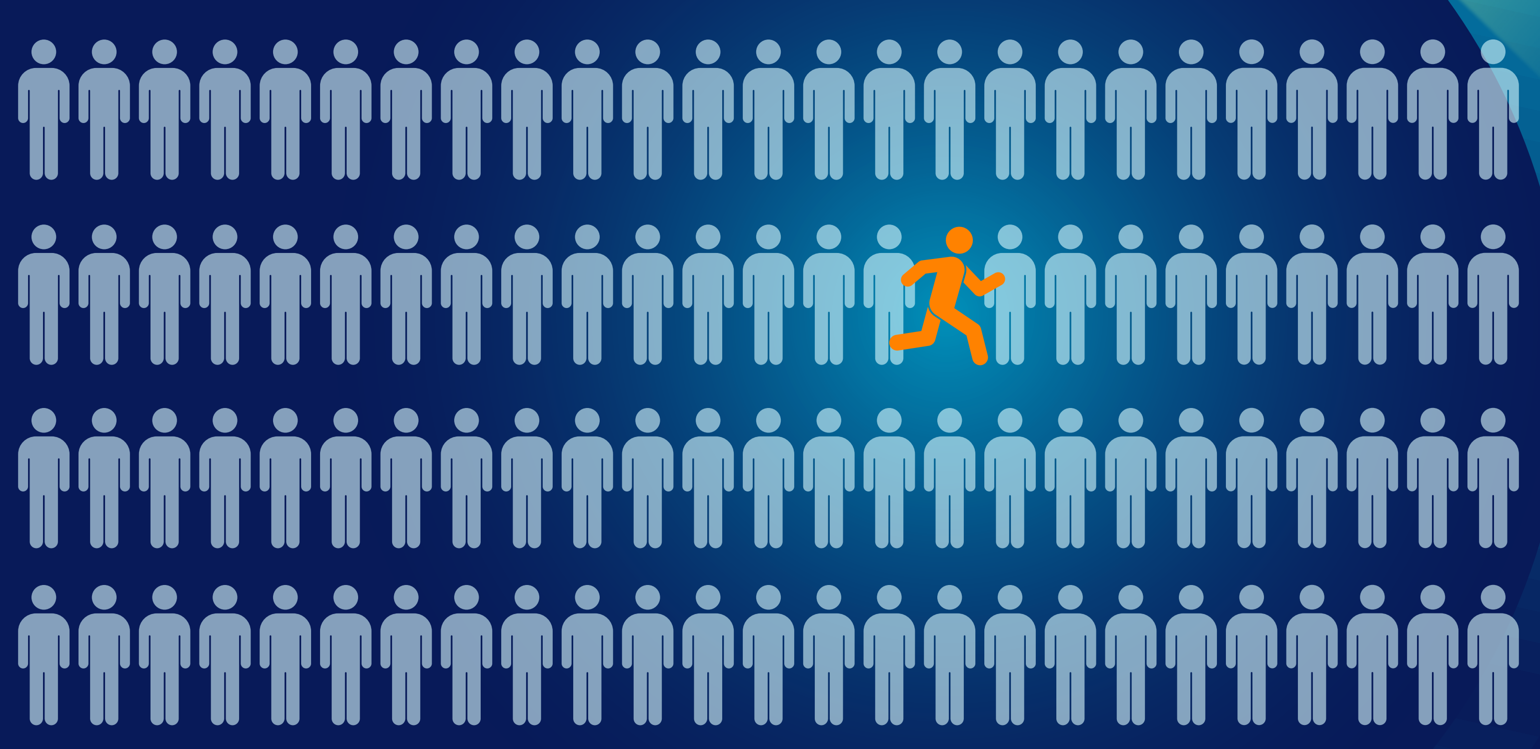
Data, compliance, and control driving AI security strategy

56% Prioritize controlling shadow AI to prevent sensitive data leakage

43% Concerned over data sprawl and regulatory non-compliance

53% More than half fear losing control over decision-making

Despite high AI adoption, only 1 in 100 can move quickly



What limitations restrict innovation in financial services?

The issues leaders are experiencing:

60% Infrastructure challenges regularly block innovation and complicate launches

31% Insufficient resources for technology investment

21% Siloed security systems from different vendors

Innovation thrives when coupled with innovative security

With zero trust as the control plane, and secure access service edge (SASE) as the architectural foundation, financial institutions are able to govern their entire AI ecosystem, balancing the need for innovation with stronger risk management and compliance.

Business outcomes leaders need to see:

Accelerated launch of products and services in new markets — 20%

Better network performance to support a hybrid workforce — 18%

Greater data security and compliance capabilities — 14%

Move with confidence using AI

Unified security is an enabler of business agility and growth, as well as risk management and cost reduction.

Download our full report: The AI Risk & Security Playbook for Financial Services, to find out more.

Methodology: We surveyed 100 North American IT leaders from the financial services sector in November 2025

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