

DFP Community: June Gathering

What We Heard, and What We're Going to Talk About!

June 2026 | 34 members responded to the pre-survey

Thank you to everyone who completed the pre-survey. Thirty-four members responded, and the results gave us a good sense of where the community is with AI right now. We used that data to shape the June Gathering from the ground up.

This document summarizes what we heard and explains how we structured the breakout room conversations in response to it. Our goal is for every member to walk into June knowing which room is right for them and why.

What We Heard

A few things stood out clearly from the survey results.

Most of you are already using AI.

76% of firms are using AI in some form. Only one respondent said their firm hasn't started. But how structured that use is varies significantly: 38% describe it as informal with no firm-wide approach, and 38% say they have an intentional, structured approach in place.

You are personally ahead of your firm.

66% of members say they personally use AI regularly or have it integrated into their daily work. That outpaces the 38% who say their firm has a structured approach. Many of you are doing more with AI on your own than your firm has formally adopted.

Client communication is where most of the action is right now.

65% said client communication is where they've found AI most useful, far ahead of any other category. This likely reflects general AI tools being easiest to apply to email and follow-up work.

The planning workflow is the harder question nobody has figured out yet.

48% said their biggest area of uncertainty is how to use AI in actual financial planning work without sacrificing quality. That's the top open question across the community, and it's the one that has the fewest good answers so far.

The obstacle is time, not skepticism.

47% said not having enough time to evaluate and implement is their biggest obstacle. Nobody selected advisor skepticism or cost. This isn't a buy-in problem, it's a bandwidth and prioritization problem.

You want to hear from each other, not be taught.

58% said the most valuable conversation would be hearing what tools others are actually using and what they think. That shaped everything about how we've designed the rooms.

Tool confidence is low across the board.

73% described themselves as not confident or only somewhat confident in their ability to evaluate whether an AI tool is worth using.

What the survey told us	% of members
Use AI regularly or have it integrated into daily work (personally)	66%
Found AI most useful for client communication	65%
Most uncertain about AI in the actual planning workflow	48%
Cite time as the top obstacle to adoption	47%
Want to hear what tools others are using and what they think	58%
Not confident or only somewhat confident evaluating AI tools	73%
Firm has no formal written AI guidelines	62%

How We're Structuring the Conversation

Based on what you told us, we're running four breakout rooms. You'll self-select into the one that fits where you are. Each room is designed around a specific set of questions and a specific kind of member, so you can spend the time in a conversation that's actually relevant to you.

A note on format: these rooms are peer conversations, not presentations. There's no agenda to get through and no one teaching from the front. The goal is for you to hear what others in similar roles are doing, ask the questions you can't ask anyone at your own firm, and leave with something useful.

Room 1: AI for Client Communication

You're already using AI to write emails, summarize meetings, and follow up with clients. This room is for going deeper. We'll talk about what's actually working, how you're maintaining your firm's voice, and what your review process looks like before anything goes out the door.

65% of members said client communication is where AI has been most useful. This room is for members who have real experience here and are ready to compare notes on workflow, quality control, and voice consistency.

Room 2: AI in the Planning Workflow

This is the harder problem, and most of us don't have it figured out yet. How do you actually use AI in planning work without sacrificing quality or accuracy? This room is for honest conversation about what you've tried, what's fallen flat, and what you're still trying to figure out.

48% said this is their top area of uncertainty, but only 9% have found AI most useful here yet. High curiosity, low experience. Expect more questions than answers, and that's the point!

Room 3: Tools, Evaluation, and What's Actually Worth It

With new AI tools launching constantly and existing platforms adding AI features every quarter, how do you decide what deserves your time and budget? This room is for comparing notes on what you're using, what you've abandoned, and how you're building the judgment to evaluate what comes next.

91% use general AI assistants. 41% have tried AI features in planning software. 74% aren't confident evaluating whether a tool is worth using. This is a peer evaluation conversation, an opportunity to share ideas and experiences.

Room 4: Moving Your Firm Forward on AI

You may be personally ahead of where your firm is. This room is for members who are trying to move the organization, not just themselves. We'll talk about ideas on how to proceed with creating structure, how to get leadership aligned, how to handle compliance concerns, and what firm-wide rollout might actually look like in practice.

47% cite time as the top obstacle. 24% cite compliance uncertainty. Several members asked specifically about pilot structures and Microsoft Copilot SEC compliance. This is a change management and leadership conversation.

Prompts for Discussion For Each Breakout Room

These questions are meant to help get the conversation started. Use them, ignore them, or let the discussion take you somewhere better!

Room 1: AI for Client Communication

1. Are you using AI to help write client communications, and if so, what does your review process look like before anything goes out?
 2. Where have you found AI most useful in client communication, and where has it fallen flat or created more work?
 3. How are you thinking about maintaining your firm's voice when AI is involved in client-facing writing?
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Room 2: AI in the Planning Workflow

These questions are meant to help get the conversation started. Use them, ignore them, or let the discussion take you somewhere better.

1. What's one part of your planning workflow where you've actually tried using AI, and did it save you time or create more problems than it solved?
 2. How are you handling accuracy concerns when AI is involved in work that ends up in front of a client?
 3. What would have to be true for you to trust AI with more of the planning process than you do today?
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Room 3: Tools, Evaluation, and What's Actually Worth It

These questions are meant to help get the conversation started. Use them, ignore them, or let the discussion take you somewhere better.

1. Which tools in your current tech stack have rolled out AI features, and are you actually using them or ignoring them?
 2. What's a tool you've tried that didn't deliver what it promised, and what made you walk away?
 3. How do you decide whether a new AI tool is worth your time to evaluate, given how fast the landscape is moving?
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Room 4: Moving Your Firm Forward on AI

These questions are meant to help get the conversation started. Use them, ignore them, or let the discussion take you somewhere better.

1. What's the biggest internal obstacle you're running into when it comes to getting your firm to use AI consistently, and how are you approaching it?
2. Has your firm established any formal policies or guardrails around AI use, and if so, how did you get there?
3. If you were going to run a pilot before a firm-wide rollout, what would that actually look like, and what would you need to have in place first?

See you June 8!