

The CFO's Guide to Claude Integrations

Connectors, plugins, and skills for finance professionals

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Last week, Anthropic dropped finance-specific plugins for Claude. Most CFOs won't notice for six months. By then, the analysts who figured it out early will have built workflows that make everyone else look slow.

I've been testing these for a week. Here's the honest breakdown.

What Happened While You Were Closing the Books

Here's what changed: Claude went from "smart assistant you copy-paste into" to "assistant that lives inside your actual workflow." It reads your spreadsheets, pulls market data, searches your email, and builds the deck. In one session. Without you re-explaining context every time you switch tabs.

I've been testing these for a week. Some of them genuinely changed how I work. Some of them are still clunky. Here's the honest breakdown.

The Three Layers: Connectors, Plugins, and Skills

Everyone's calling these "integrations," but there are actually three distinct things happening here. Understanding the difference matters because it changes how you set them up and what you get out of them.

Connectors are the pipes. They wire Claude to external tools and data sources: Google Drive, Gmail, Stripe, FactSet. A connector doesn't make Claude smarter. It gives Claude access to your stuff so you stop copy-pasting between tabs.

Plugins are the packages. Each plugin bundles connectors, skills, slash commands, and sub-agents for a specific job function. The Financial Analysis plugin, the Investment Banking plugin, the Equity Research plugin. Think of them as role-based AI teammates that come pre-loaded with the right tools and expertise for a particular kind of work.

Skills are the brain. This is where it gets interesting. Skills are domain expertise encoded as markdown that Claude draws on automatically when the context calls for it. Claude doesn't just connect to your data. It knows what to do with it. How to build comps. How to format a three-statement model. How to apply industry-standard color coding (blue for inputs, black for formulas, green for links). How to stress-test scenarios. 41 skills across the finance plugins. You don't have to tell Claude "you're a financial analyst now." It reads the context and applies the right expertise.

The mental model: Connectors bring data in. Skills know what to do with it. Plugins bundle both for your specific job.

How to Set Them Up

Connectors take about 90 seconds each:

1. Go to **Settings > Connectors** in claude.ai (or click the “+” icon in any chat)
2. Browse the connector directory (50+ available)
3. Click **Connect** on the one you want. Standard OAuth flow, same “Sign in with Google” you’ve done a hundred times
4. Toggle connectors on or off anytime from Settings

Plugins install through Cework or CLI. Navigate to the plugin directory, select the one you want, and it pulls in the associated skills and connectors automatically.

Plan requirements: Connectors are available on Pro (\$20/month), Max, Team, and Enterprise plans. The free tier doesn’t get access. If you’re a CFO evaluating AI tools and you’re not on at least Pro, you’re window-shopping.

The Connectors That Matter for Finance

Not all 50+ connectors are relevant to you. Here’s what I’d actually set up.

Google Workspace (Drive, Gmail, Calendar). The connector that changes your daily workflow fastest. Claude searches your Drive, reads your emails, checks your calendar, and saves files back. “Pull the Q4 close summary from my Drive, compare it against the forecast I emailed the CEO last month, and flag the three biggest variances.” One prompt. Done in 30 seconds. That used to take me 15 minutes of tab-switching.

Stripe / PayPal / Square. If your company processes payments through any of these, Claude pulls revenue data, transaction reports, and customer payment history directly. I connected Stripe and asked Claude to analyze our MRR trend against churn for the last six months. It flagged a cohort issue I’d missed. Two minutes.

FactSet. Real-time market data, fundamental analysis, earnings estimates. If you’re doing comp analysis, benchmarking, or investor prep, this pulls institutional-grade data into your Claude session. No more logging into a separate terminal.

MSCI. Index data, performance insights, constituent information. Useful for portfolio benchmarking or ESG analysis.

The Skills That Change Everything

This is the part most people are going to sleep on. The connectors get the headlines, but the skills are the actual breakthrough.

Here's why: before skills, Claude was a generalist. Smart, but you had to explain how finance works every time. "Format this as a three-statement model." "Use blue for inputs." "Include sensitivity tables." Now that expertise is baked in. Claude just knows. And the slash commands give you one-tap access to specific workflows when you want them.

Financial Analysis (Core Plugin)

This is the foundation. 15 skills covering the workflows every finance professional runs weekly.

`/comps [company]` builds a comparable company analysis. Not a rough sketch. A formatted comp table with the right multiples, sourced data, and industry-standard layout. `/dcf [company]` generates a DCF valuation model with assumptions you can adjust. `/lbo` builds leveraged buyout models. `/3-statement` creates integrated financial statements.

The Excel workbooks it generates use live formulas with proper color coding: blue for inputs, black for formulas, green for links to other sheets. If you've spent any time in banking or FP&A, you know how much that matters. It's the difference between a model someone can actually use and one that needs to be rebuilt.

`/sensitivity` runs scenario analysis across your key assumptions. `/qc` checks a PowerPoint deck against formatting standards. These aren't gimmicks. They're the tedious stuff that eats your Tuesday afternoons.

Investment Banking

If you're doing any deal work, this plugin has 38 slash commands built for the workflow.

`/cim` drafts a Confidential Information Memorandum. `/teaser` creates a one-page teaser. `/process-letter` generates process letters for sell-side mandates. `/buyer-list [criteria]` builds buyer lists filtered by strategic fit, financial capacity, and acquisition history.

`/merger-model` builds merger consequence analysis. `/deal-tracking` tracks live deals through milestones: LOI, diligence, definitive agreement, close. For teams running multiple processes simultaneously, that tracking alone saves hours of status update meetings.

Equity Research

`/earnings [company] [quarter]` generates a post-earnings update. Feed it the transcript and the model, and it produces the kind of note that used to take an associate until 2 AM. `/thesis [company]` helps maintain and pressure-test investment theses over time. `/screen [criteria]` screens for new ideas based on fundamental criteria. `/morning-note` drafts morning notes from overnight developments.

Private Equity

`/source [criteria]` identifies potential targets based on your investment parameters. `/diligence` structures due diligence workflows and tracks findings. `/ic-memo` drafts investment committee memos from your diligence materials. `/portfolio-kpis` tracks operating metrics across portfolio companies.

Wealth Management

`/client-review [client]` prepares client review materials. `/financial-plan` generates comprehensive financial plans. `/rebalance` identifies portfolio drift and recommends trades. `/tax-loss-harvest` scans for tax-loss harvesting opportunities across accounts.

KEY INSIGHT

Skills activate automatically based on context. If you're discussing a company's valuation, Claude draws on its financial analysis skills without being told. If you're reviewing deal documents, the investment banking skills kick in. The slash commands are shortcuts for when you want to trigger a specific workflow intentionally. But the real power is in the ambient expertise. Claude reading the room and applying the right lens.

Claude in Excel and Data-to-Deck

Claude now has a sidebar inside Excel. It reads your workbook, analyzes the data, and can modify cells. But the real feature is the cross-app workflow: Claude carries context from Excel to PowerPoint without losing the thread.

The "data-to-deck" workflow: analyze earnings data in Excel, then tell Claude to build the summary slides in PowerPoint. It doesn't ask you to re-explain the analysis. One session, two apps, zero re-pasting.

Data partners integrated into this workflow include S&P Global Capital IQ, LSEG, Daloopa, PitchBook, Moody's, and FactSet.

Current status: Research preview on Mac and Windows. It works, but expect occasional rough edges. I've had it lose context once in a complex multi-sheet model. Save your work.

Bonus: Accounting Software via MCP

If you use QuickBooks or Xero, MCP servers connect them to Claude Desktop. Xero's is particularly mature, with direct access to contacts, invoices, quotes, and account data.

The key difference from web connectors: MCP runs locally through Claude Desktop. Your data doesn't route through Anthropic's servers. For sensitive financial data, that matters. Setup is

more technical (editing a config file), but once configured, you can pull AR aging reports, analyze payment patterns, or flag overdue invoices without opening Xero.

The Honest Take

Here's the Both/And truth: this is genuinely useful AND still early.

What works today: Google Workspace integration is solid. Asking Claude to search your Drive, read an email thread, and synthesize information across sources, that works well and saves real time. The payment connectors (Stripe, PayPal) are reliable for pulling transaction data. The Cowork finance plugins are impressive for structured workflows like comps and model updates.

What's still clunky: The Excel sidebar is in research preview, and it shows. Complex multi-sheet workbooks can trip it up. The FactSet and MSCI connectors work, but getting the most out of them requires knowing what to ask for. They're not going to replace an analyst who already knows their way around a terminal. And the cross-app workflow (Excel to PowerPoint) occasionally drops context on longer sessions.

What I'd set up first: Google Workspace. Highest-impact, lowest-effort. You'll use it every day within the first week. Then Stripe or whichever payment processor you use. Then pick one plugin that matches your actual job and learn its slash commands.

Your Monday Morning Action

Three things you can do this week:

- **Today:** Open claude.ai/settings, go to Connectors, and connect Google Workspace. Ask Claude to summarize the last financial report in your Drive.
- **This week:** Install the Financial Analysis plugin and run `/comps` on a company you're tracking. See what it builds. Then try `/dcf` on the same company and compare.
- **This month:** Pick the specialized plugin closest to your role (IB, PE, ER, or Wealth Management). Build one repeatable workflow with its slash commands. A monthly comp update. A quarterly deck template. A client review prep.

The CFOs who figure out these integrations in March will have six months of compounding workflow improvements by September. The ones who wait will spend September trying to catch up.

Start small. Connect one thing. See what breaks.

—Saul

P.S. I spent two days connecting everything and asking Claude random questions about my data. Half was useful, half was novelty. Build on the useful half.