FREE · STARK'S LIFE WITH AI

THE FINANCE ANALYST'S AI PROMPT PACK

The 9 prompts from the video **"How I Use AI to Do My Finance Job Faster"**. Paste them into any AI, swap in your own details, and check the answer.

WHAT'S INSIDE

1. Spreadsheets: 3 prompts
2. Reports: 2 prompts
3. Emails: 2 prompts
4. Learning and meetings: 2 prompts
5. My 3 rules, and what AI gets wrong

HOW TO USE THESE

1. **Use the AI your company allows.** These work in Claude, ChatGPT, Copilot, Gemini and others.
2. **Replace anything in [brackets]** and any sheet or column names with your own.
3. **Never paste confidential data.** Use made-up numbers, or take the names out first.
4. **Check the answer.** Add up totals yourself. AI writes the draft; your name is on the work.

1. SPREADSHEETS

1A WRITE A LOOKUP FORMULA

```
I have an Excel sheet called "[sheet name]" with these columns starting in row [row]: [list
your columns].
Another sheet, "[lookup sheet]", has [key] in column A and [what you want] in column B.
Write the formula for [cell] that fills in [what you want] from the [key] in [cell].
Explain it in one sentence.

Here are the first few rows:
[paste 4 or 5 rows, including the header]
```

Pasting a few rows lets it see what your data really looks like.

1B TOTAL BY CATEGORY

```
On a sheet called "[summary sheet]", [category] names are in [range, e.g. A4 to A9].
Write the formula for [cell] that totals the [amount] column on "[data sheet]" for that
[category].
It should still work when I add more rows.
```

1C FIX A BROKEN FORMULA

```
This formula gives [error, e.g. #REF!] and I don't know why. Explain what's wrong in plain
words and fix it:
[paste the formula]
[One line on what the cell holds and what you want back.]
```

Ask for the "why". Next time you'll spot it yourself.

2. REPORTS

2A VARIANCE COMMENTARY

```
You are helping a finance analyst write month-end commentary.
Below is [month]'s budget vs actual for [area], with notes from each team.
Write the variance commentary for my manager:
- Start with one sentence on the total.
- Then the 4 biggest variances, biggest first, each with the dollar amount, the percent and
the reason.
- Say which variances are timing (they reverse in a later month) and which are real
overspend.
- End with one line for everything else, so the numbers add up to the total.
- Plain language, under 180 words, no bullet points inside sentences.

[paste the table, including the notes column]
```

Then check its total and its split against your sheet. It can add things up wrong.

2B THE MANAGER'S QUESTION

```
Good. Now give me the one question my manager is most likely to ask about this, and a 2-
sentence answer.
```

3. EMAILS

3A FROM ANNOYED TO SENDABLE

```
Turn these rough notes into an email to a coworker in another department.
Keep it polite and direct. Put the deadline and exactly what I need in the first two lines.
Don't make it sound angry, and don't make it sound like a robot.

[paste your rough notes, typed the way you actually think them]
```

3B MAKE IT SHORTER

```
Shorter. Under 90 words.
```

Follow-ups like this are where most of the value is. Keep talking to it.

4. LEARNING AND MEETINGS

4A LEARN ANYTHING, THEN GET QUIZZED

```
Explain what [topic, e.g. a rolling forecast] is, like I'm one month into my first [field] job.
Use one everyday example. Then ask me 3 questions to check I understood, one at a time.
```

4B MEETING PREP

```
I have a [meeting, e.g. budget review] with my [director] in 10 minutes, on the [commentary you wrote above].
What are the 5 toughest questions [she/he] could ask, and what should I have ready for each?
```

Send this in the same chat as 2A, so it already has your numbers.

WHAT AI GETS WRONG

1. **The math.** It can add things up wrong and won't tell you.
2. **It makes things up,** and sounds confident doing it.
3. **It doesn't know your company,** your boss, or what happened last quarter. You do.

MY 3 RULES

1. USE THE AI YOUR COMPANY ALLOWS
2. NOTHING CONFIDENTIAL GOES IN
3. AI DRAFTS. YOU CHECK.

Want your whole team doing this safely? That's the next problem, and it's what I teach.

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