

CASHFEED × CLAUDE · WORKSHOP FOR FINANCE

Claude for finance

From explanation to practice

Your second pair of eyes for finance work.

Jonathan Callewaert · Cashfeed

~ 45 MINUTES

S P E A K E R

Jonathan Callewaert

10 years building AI products — from chatbots before the LLM hype to an AI-first invoice-automation platform today.

Founder, Cashfeed

Invoice automation



Claude for finance

S P E A K E R

Kristof Beckers

From corporate finance and M&A advisory to building a managed finance firm for scale-ups and SMEs.

Founder & Managing Partner, Ventureleap



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Ventureleap

Follow us

Claude for finance

NOW

Founder & Managing Partner · Ventureleap

Managed finance for scale-ups and SMEs: finadmin, CFO services and corporate finance. Founded in 2022.

BEFORE

Corporate finance · PwC & BNP Paribas Fortis

Then an independent boutique M&A advisory firm, working across sectors and deal types.

TRACK RECORD

40+ clients: start- and scale-ups and SMEs

Finadmin and CFO services as the core: monthly close, reporting, budgets and cash flow, from Twikey and Shayp to TinkerList.

One outsourced finance department

Managed finance: we take finance off your plate so you can do what you're good at.

01

Finadmin

The daily engine: booking invoices, payments and debtor follow-up, reconciliation and a clean monthly close.

Runs daily for 20+ companies

02

CFO services

Financial control and monthly reporting, budgets and cash flow management, at the size you need.

Reporting for management, board, investors and banks

03

Corporate finance

Business plans, bank financing, fundraising and M&A, when the moment comes. Same team, no handover.

Multiple rounds raised · exits to strategic buyers

A team, not a single CFO

Every client gets a team behind the account: consultants back each other up, work is reviewed, and nothing depends on one person's agenda or holiday.

2022

founded, in Hasselt

5

finance professionals

40+

companies, start-up to SME

Kristof Beckers

Founder & Managing Partner

Thibaut Cienszkowski

Finance Manager

Lauren Serré

Senior Finance Consultant

Laura Lupo

Senior Finance Consultant

Joris Zeegers

Finance Consultant

BEFORE WE START

Your data stays yours.

On commercial plans — Team or API — your inputs aren't used to train the models, and they're not kept around. Today we work with demo and anonymised data only.

01

Commercial plan

No training on your inputs.

02

Demo data today

Anonymised, scaled amounts.

03

Rule of thumb

Don't paste what you wouldn't email.

New model, new terms — always re-read them. One recent release kept inputs for ~30 days for safety review before deleting, even on commercial plans.

What we'll cover

- | | | |
|----|--|--------|
| 01 | <h2>Understanding Claude</h2> <p>What large language models actually are — and how to brief one.</p> | 10 min |
| 02 | <h2>Claude in finance</h2> <p>Where it earns its keep, and the one rule that matters.</p> | 10 min |
| 03 | <h2>Showcases</h2> <p>Six real cases on real ledgers — skills, artifacts and agents.</p> | 15 min |
| 04 | <h2>Your turn</h2> <p>Laptops open, workshop files, pick your track.</p> | 10 min |

01 PART ONE

Understanding Claude

What Claude and large language models actually are.

A well-read colleague — that predicts the next word

It has read almost the whole internet and reasons in plain language. Under the hood, it's really a very good autocomplete.

so

Brief it like a sharp new hire

In sentences, with context and an example. Not keywords.

It does the tedious. You make the calls.

GOOD AT

Reading long, messy documents end to end

Testing every line against a rule

Explaining a finding in plain language

Repeating the same procedure without drift

Drafting the email, the memo, the checklist

NOT GOOD AT

Being the final authority on a number

Knowing your internal context unless you give it

Long mental arithmetic without a tool

Saying "I don't know" as often as it should

Tax advice, audit sign-off, judgement calls

One Claude, several front doors

01

claude.ai

Chat in the browser. Upload a file, ask, get an answer.

Best for one-off questions

02

Desktop app

Your folders, your connectors, your skills — on your machine.

Where today's showcases run

03

Claude Code

Runs procedures over files and systems, step by step.

Repeatable, auditable work

04

API

Claude inside your own product — how Cashfeed uses it.

For builders

WHY THIS, NOT THAT

Why Claude for finance work

The big models are all capable. This is about fit for the work on this desk.

A finance focus from early on

Not a general chatbot that later discovered accountants — finance has been a deliberate focus.

Good with financial data

Ledgers, invoices, Excel exports — it holds the detail instead of rounding it away.

Many ways into the same data

Connectors, cowork, file rendering, artifacts — one dataset, several ways to work it.

It shows its evidence

Quotes the line, names the rule, and flags what it couldn't verify — instead of a confident guess.

Procedures, not one-offs

Skills re-run the same checks the same way every close — and it drafts the follow-up, not just the finding.

Terms you can sign

Commercial plans don't train on your inputs — the reason this is usable at all in finance.

How to ask well

Be specific

Name the file, the period, the rule. "Check the VAT" is not a task.

"...in Q2 2025, purchase ledger only"

Give an example

One worked case teaches more than a paragraph of instruction.

"like this row: ..."

Ask for the format

Table, five bullets, Excel file, draft email. Say which.

"one row per exception"

Ask for evidence

Make it quote the line and name the rule, so you can verify fast.

"quote the source line"

02 PART TWO

Claude in finance

Tips, tricks, and the one rule that matters.

Where it earns its keep

Payment & AP checks

Duplicates, changed bank accounts, splits under the approval limit.

VAT & ledger review

Deduction caps, reverse charge, mis-booked accounts — before filing.

Reconciliations

Two lists, one truth: what matches, what doesn't, and why.

Contracts & fine print

Notice periods, indexation, auto-renewals — quoted, not paraphrased.

Cost & supplier scans

Overlapping tools, creeping subscriptions, zombie charges.

Reporting & drafting

Board summaries, client mails, follow-up lists — from the numbers you approved.

Claude flags. You decide.

It surfaces the exceptions, with the evidence attached, so you can check each one against the source. The decision stays with you.

CLAUDE

Flags exceptions, with evidence



YOU

Check & decide

Getting more out of fewer tokens

A short prompt isn't a cheap prompt. What costs you is the material you attach and the history you drag along.

Send the slice, not the ledger

Filter the export to the period, the journal, the columns that matter. 200 rows beats 20,000.

One task, one chat

Every reply re-reads the whole thread. Start fresh per task instead of one endless conversation.

Put the rules in a skill

Write the procedure once instead of re-pasting two pages of instructions every run.

Ask for exceptions only

"Only the lines that fail, one row each" — not a commentary on all 162 payments.

03

PART THREE

Showcases

Six real examples on real ledgers — an AP audit, a VAT review, a live cockpit, a cost scan, a behaviour-based cashflow forecast and an agent with a human check.

Skills — teach it once, re-run on any file

A skill is a procedure you hand Claude once. It runs the same checks, the same way, every time.

WHICH MEANS

The next two showcases are one
click each

same checks

same order

any file

AP & payment audit

THE PAIN

An invoice paid twice — €4,250

A supplier's bank account changed to Lithuania —
€18,400 (BEC)

Payments split under the approval limit

Payments with no matching invoice

WHAT CLAUDE DID

7

exceptions flagged

€32,650

at risk

Population: 162 payments · €188k · 22 vendors · €45,580
flagged for review. Every line tested, under a minute.

VAT review: the purchase ledger

THE PAIN

Construction work that needed reverse charge

A foreign supplier (DE/IE) — reverse charge missed

VAT wrongly deducted on restaurant & reception

Car costs over the 50% cap, mis-booked accounts

WHAT CLAUDE DID

€1,650

of VAT to correct before filing

11

lines flagged

Reads the GL account and the description · not tax advice.

Artifacts — ask once, keep the tool

An artifact is when Claude builds you a real tool — a live dashboard, a checklist — not a one-off answer. Hit reload and it re-fetches.

PROPERTIES

live

reloadable

yours to keep

The live Cashfeed cockpit

THE ASK

One prompt builds a self-refreshing dashboard from live Mock Company Demo data:

Cash flow & top suppliers

AI-tool spend & duplicate-vendor alert

Missing invoices & invoice status

DPO, last 3 months

WHAT CLAUDE BUILT

1 prompt

→ a live, reloadable dashboard

Hit reload, it re-fetches. Ask once, keep the tool.

Where can we cut costs?

THE PAIN

The question every owner asks — but no one has hours to answer

Overlapping tools nobody reviews

Subscriptions that quietly creep up

Duplicate and zombie charges

WHAT CLAUDE DID

€30k+/yr

in savings surfaced — in one prompt

Slack + Teams

2 chat tools

Adobe

€295 → €640

Salesforce

€23.4k/yr

Live, read-only. You decide what to cut.

Cashflow forecasting on real payment behaviour

THE PAIN

A forecast built on due dates is a forecast built on promises

This customer always pays 12 days late — the sheet doesn't know that

Your own payment behaviour towards suppliers is ignored too

So the weekly view is optimistic in, pessimistic out

WHAT CLAUDE DOES

Takes the open invoices, then shifts each one by how that party actually pays — in and out.

+12d

median lateness per customer

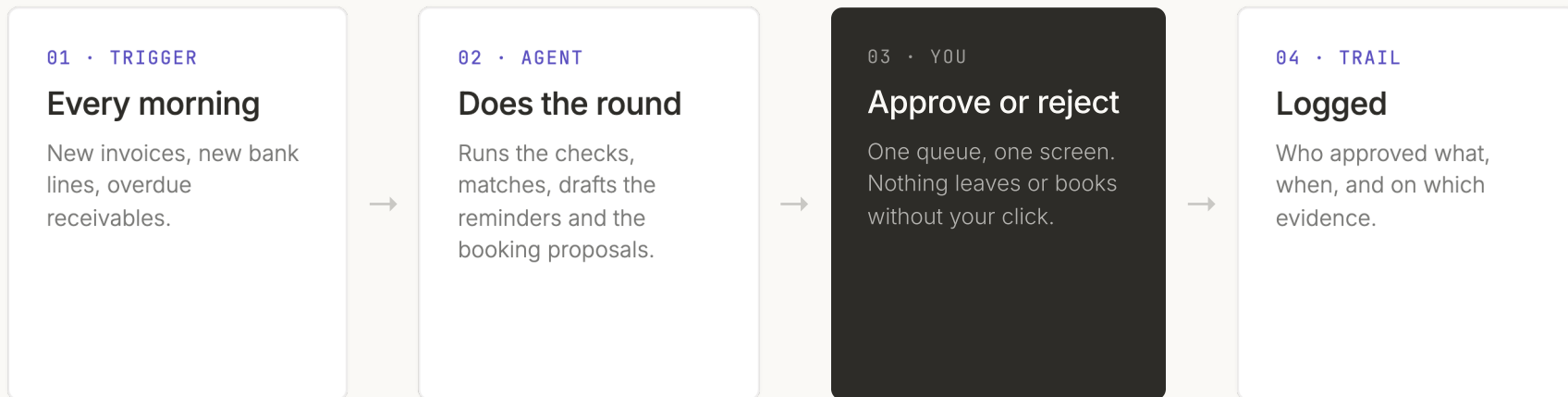
13 wk

rolling weekly & monthly view

Due date is a promise. Payment history is a fact — forecast on the fact, per counterparty, both sides of the ledger.

Routine work on autopilot — with you in the loop

The agent runs the round every morning and prepares everything. The last step is always a human one.



04

PART FOUR

Your turn

Open your laptop — grab the workshop files.

FILES tinyurl.com/cashfeedworkshop

Choose your track — and just start

Self-select, solo or with a neighbour. A few of us circulate — from beginner to advanced.

TRACK 01

First prompt

Upload the demo ledger and ask one question. Get comfortable with the file
→ answer loop.

Never used Claude before

TRACK 02

Run the audit

Use the AP or VAT skill on the workshop file, then check two flags against the source.

Used it a few times

TRACK 03

Break the skill

Find where it fails, then make it fail less.
Details on the next slide.

Experienced user

Advanced challenge — break the skill

A clever answer isn't yet a reliable tool. Two tracks — start with the hunt.

A · THE HUNT

Make it miss something

Edit the file: change a date format, split an amount, rename a vendor.

Re-run the skill. Which check silently stops firing?

Write down the false negative and how you spotted it.

B · THE FIX

Harden the procedure

Add the missing rule to the skill in plain language.

Require evidence per flag: the rule that fired, the line quoted.

Re-run on the clean file too — it should still find nothing new.

THAT'S A WRAP

Thank you.

Questions welcome — come find us.

FEEDBACK tinyurl.com/cashfeedfeedback

Jonathan Callewaert · Cashfeed