

AI Prompt Pack for Financial Research

Free educational guide

CorporateTrader

No guaranteed returns • Verify important information

How to use prompts safely

A prompt structures a task; it does not guarantee a correct answer. Never paste passwords, API keys, private account data or personally identifying financial records. Verify consequential outputs against primary sources.

Source-first research prompt

“Explain [topic] for [audience]. Use primary regulator, government or academic sources. Separate confirmed facts from assumptions. Quote no statistic unless a source and date are provided. List unresolved questions.”

Calculator audit prompt

“Audit this calculator formula and assumptions. Define every variable, units and compounding convention. Test zero, negative, boundary and large inputs. Provide independent sample calculations. Flag legal, tax or market cases outside scope.”

Claim-checking prompt

“Extract every factual claim from this draft. Classify each as sourced, calculation, opinion or unsupported. For sourced claims, provide the original source and publication date. Rewrite or remove unsupported claims.”

Decision-comparison prompt

“Compare options A and B for this stated objective. List costs, risks, liquidity, tax assumptions and conditions where each may be preferable. Do not recommend an option without the user’s constraints. Include a neutral checklist.”

Human review checklist

Check source authenticity, dates, arithmetic, missing context, jurisdiction, conflicts of interest and whether language implies certainty. AI output should be treated as a draft for verification, not as professional financial advice.