AI IMPACT REPORT NO. 321 · REVISED 5 OCTOBER 2026 · 250 ROLES COVERED

Financial Planners

AI fundamentally restructuring financial planning, portfolio management, and client interaction for planners.

EXPOSURE	WINDOW	ADOPTION TODAY	READING
69	2–5 yrs	High	Substantial automation of routine work.
High exposure	until change lands		Exposure is the share of today's work AI can plausibly take on within the window.

§ 01 WHAT IS HAPPENING

What is happening to financial planners

Impact

AI tools are autonomously managing portfolio rebalancing, performing tax-loss harvesting, generating personalized financial plans, and automating routine client communication. This compels Financial Planners to radically pivot towards complex holistic life planning, behavioral coaching, ethical oversight of AI-driven advice, and high-touch, emotionally intelligent client relationships.

Risk

Radical role overhaul; pervasive automation leading to significant workflow redefinition and specialized human focus.

The Financial Planner role is undergoing a profound and accelerating redefinition by AI. AI will assume command of vast data synthesis, portfolio optimization, and much of the transactional client interaction. Financial Planners must immediately pivot to becoming experts in leveraging AI for hyper-efficiency and enhanced strategic insights, intensely validating AI-generated advice for accuracy and ethical fairness, and dedicating their expertise to the irreplaceable human elements of the role: deep empathy, nuanced understanding of client life goals, behavioral coaching, and critical ethical decision-making regarding complex financial futures.

Sector readiness

Rapid & Transformative Integration

The wealth management and financial advisory sectors are aggressively integrating AI, driven by client demand for personalization, efficiency, and data-driven insights, alongside competitive pressures from robo-advisors. AI is rapidly moving beyond pilot stages to widespread adoption for portfolio management and client engagement, though regulatory and ethical frameworks are still striving to keep pace.

§ 02 POSITION

Where you stand

i The Financial Planner role is undergoing a profound and accelerating redefinition by AI, fundamentally restructuring financial planning, portfolio management, and client interaction.

ii AI will autonomously manage vast data, optimize portfolios, and streamline communication, compelling planners to pivot to indispensable holistic life planning and profound human connection.

iii Survival and impact will hinge on Financial Planners mastering AI tools, critically validating AI outputs for fairness, championing ethical AI, and providing irreplaceable empathetic guidance and nuanced judgment in guiding clients' financial futures.

§ 03 ACTIONS 15 POINTS

What this means for you

Concrete changes to how the work gets done, in the order you are likely to meet them.

01 **AI-Driven Autonomous Portfolio Management.** Financial Planners will oversee AI systems that autonomously rebalance client portfolios, perform tax-loss harvesting, and optimize asset allocation based on pre-defined risk profiles and market conditions. This frees planners from tedious rebalancing, demanding oversight and strategic adjustments.

02 **Hyper-Personalized Financial Plan Generation.** Financial Planners will orchestrate AI platforms that autonomously generate comprehensive financial plans, including retirement projections, college savings strategies, and investment roadmaps, tailored to granular client data and life goals. The planner will validate these AI-orchestrated plans and manage the nuanced human elements of goal setting and adherence.

03 **Predictive Analytics for Client Behavior & Churn.** Financial Planners will leverage AI models that autonomously analyze client activity, engagement, and communication patterns to predict potential disengagement or churn. This enables proactive outreach and personalized interventions to strengthen client relationships and enhance retention.

04 **AI-Assisted Behavioral Coaching.** AI tools will autonomously identify client behavioral biases (e.g., loss aversion, overconfidence) in real-time, providing Financial Planners with prompts or strategies for effective coaching. This empowers planners to help clients make more rational financial decisions and stick to their plans.

05 **Automated Client Communication & Reporting.** AI will autonomously handle a significant portion of client communication, including personalized market updates, performance reports, and reminders for financial actions. Financial Planners will focus on the most critical client interactions and complex, empathetic conversations.

06 **Intelligent Risk Assessment & Mitigation.** Financial Planners will utilize AI tools that autonomously analyze client risk tolerance, synthesize vast market data, and model portfolio vulnerabilities under various economic scenarios. This provides highly precise risk assessments and informs dynamic mitigation strategies.

07 **AI for Tax Optimization & Estate Planning.** Financial Planners will command AI systems that autonomously identify tax optimization opportunities (e.g., capital gains harvesting, specific deductions) for clients and assist in drafting initial estate planning considerations based on client profiles and legal frameworks.

08 **Focus on Holistic Life Planning & Emotional Intelligence.** As AI assumes command of quantitative tasks, the paramount value of Financial Planners will be the irreplaceable human ability to understand profound life goals, navigate emotional complexities, provide empathetic support, and integrate financial strategy with all aspects of a client's life.

09 **Ethical AI in Financial Advice & Fiduciary Duty.** Financial Planners will bear profound responsibility for auditing AI systems for algorithmic bias (e.g., in asset allocation, risk assessment), ensuring data privacy, and upholding the fiduciary duty to act in the client's best interest. This requires deep understanding of AI's limitations.

10 **AI-Driven Market Research & Due Diligence.** Financial Planners will leverage AI tools that autonomously sift through vast amounts of investment research, company filings, and market news to identify opportunities, perform due diligence on specific investments, and monitor economic trends.

11 **Human-AI Teaming for Client Advisory.** Financial Planners will operate in seamless human-AI teams. AI will process vast data, generate predictions, and automate advice, while the human planner leads complex advisory, fine-tune AI settings, and manage nuanced human interaction, maintaining ultimate authority and judgment.

12 **Specialization in Complex Financial Scenarios.** The field will see a rise in Financial Planners specializing in highly complex financial scenarios (e.g., generational wealth transfer, complex business sales, international tax planning) that demand intricate human judgment and bespoke solutions beyond AI's current capabilities.

13 **Continuous Learning & FinTech Literacy.** The rapid advancements in AI will necessitate continuous, aggressive learning of new AI-powered tools, their financial capabilities, and ethical implications. Financial Planners must proactively re-skill to remain clinically relevant and effective.

14 **Leadership in Digital Wealth Management Transformation.** Financial Planners will play a leading role in guiding their clients and firms through the adoption of AI, advocating for client-centric AI solutions, and shaping the future of digital wealth management.

15 **Strategic Client Acquisition & Value Proposition.** As AI automates many operational tasks, Financial Planners will dedicate more time to crafting compelling value propositions, strategically acquiring high-value clients, and fostering profound, long-term relationships built on trust and expert advice.

§ 04 CAUSES 10 DRIVERS

What is pushing this change

01 **Explosive Growth of Financial & Behavioral Data.** Vast amounts of market data, client financial data, behavioral patterns, and alternative data provide rich input for AI models.

02 **Revolutionary Advancements in AI/ML (Predictive Analytics, Generative AI).** Breakthroughs in AI fields enable sophisticated analysis, autonomous prediction, and intelligent decision support for financial decisions.

03 **Urgent Demand for Personalized & Accessible Financial Advice.** Clients demand highly individualized financial plans and advice tailored to their unique life goals and risk profiles.

04 **Rising Client Expectations for Digital Experiences.** Clients expect seamless digital experiences, real-time portfolio access, and instant information from their advisors.

05 **Intense Competitive Pressure from Robo-Advisors & FinTech.** AI-first robo-advisors offer low-cost, automated solutions, forcing human advisors to differentiate through higher-value services.

06 **Critical Need for Cost Optimization in Advisory Services.** AI automation of portfolio management, compliance checks, and routine communication significantly reduces operational costs.

07 **Complexity of Financial Markets & Regulations.** AI helps manage vast, interconnected financial data and complex regulatory environments with greater precision.

08 **Shortage of Skilled Advisors for Complex Needs.** While AI handles basic planning, complex client situations (e.g., business owners, multi-generational wealth) require specialized human expertise.

09 **Growth of Behavioral Finance Insights.** AI enables the analysis of granular client behavior data to inform more effective coaching and planning.

10 **Demand for Proactive Risk Management.** AI's ability to predict a broad spectrum of financial risks enhances proactive risk management for client portfolios.

§ 05 VARIATION 5 SECTORS

Impact by sector

The headline figure is an average. Where you work changes the picture.

Wealth Managers (High Net Worth & Ultra High Net Worth Clients)	AI for sophisticated portfolio analytics, alternative investment research, complex estate/tax planning support, and bespoke reporting. Core value in highly personalized strategic advisory and managing complex family wealth.
Retirement Advisors	AI for autonomous retirement income projections, withdrawal strategies, and longevity risk modeling. Focus on personalized income planning and holistic retirement readiness.
Investment Managers (Portfolio Management)	AI for autonomous portfolio optimization, asset allocation modeling, and identifying investment opportunities. Focus on strategic asset management and meeting client-specific investment goals.
Tax Planners (Strategic)	AI for autonomous tax optimization opportunities, modeling tax impacts of investment decisions, and preparing tax-related financial documents. Focus on complex tax strategy and compliance.
Estate Planning Advisors	AI for autonomous drafting of estate planning considerations, analyzing beneficiary structures, and optimizing legacy planning. Focus on nuanced family wealth transfer.

§ 06 PREPARATION 8 SKILLS

Skills to build

The skills that keep the human part of this work valuable as the routine part is automated.

01 **Holistic Financial Planning.** The core ability to understand a client's entire financial picture (investments, insurance, estate, tax) and integrate it with their life goals, values, and emotional context.

02 **AI/FinTech Literacy & Automation.** Proficiency in using AI-powered financial planning software, robo-advisory platforms, and CRM systems with AI features for client insights and automation.

03 **Behavioral Coaching & Emotional Intelligence.** The irreplaceable human ability to understand client psychology, manage emotions around money, and guide clients to make rational financial decisions.

04 **Ethical AI & Fiduciary Responsibility.** Navigating complex ethical dilemmas posed by AI in financial advice (e.g., algorithmic bias, data privacy), ensuring fiduciary duty, and upholding client trust.

05 **Strategic Client Relationship Management.** Building and maintaining deep, long-term, trust-based relationships with clients, understanding their evolving needs, and acting as a true financial partner.

06 **Data Analysis & Interpretation.** Ability to interpret vast client financial data, AI-generated insights (e.g., risk predictions, churn likelihood), and market trends to inform advice.

07 **Compliance & Regulatory Acumen.** Deep knowledge of financial regulations (e.g., SEC, FINRA), tax laws, and industry compliance requirements, and overseeing AI-driven compliance checks.

08 **Adaptability & Continuous Learning.** Willingness to rapidly learn new AI tools, adapt advisory processes, and stay updated on the fast-evolving FinTech and economic landscape.

§ 07 INSTRUMENTS 12 ENTRIES

Tools in use

KINDS OF TOOL WORTH KNOWING

01 **AI-Powered Financial Planning Software.** Software that uses AI to analyze client data, model financial goals, simulate scenarios, and generate personalized financial plans.

02 **Robo-Advisory Platforms (or Hybrid Models).** Automated investment platforms that manage client portfolios based on algorithms, often with a human advisor for complex needs.

03 **CRM Systems with AI for Client Insights.** Customer Relationship Management systems with integrated AI for lead scoring, client health monitoring, and personalized communication suggestions.

04 **Generative AI for Client Communication & Reporting.** Large Language Models (LLMs) used to draft personalized market updates, performance reports, financial education content, and client emails.

05 **Predictive Analytics Platforms (Client Behavior).** Software that uses AI/ML to analyze client activity, engagement, and communication patterns to predict churn or identify opportunities.

06 **AI for Compliance Monitoring.** AI tools that continuously monitor client accounts and transactions for compliance with regulations (e.g., suitability rules, AML) and internal policies.

NAMED TOOLS ALREADY IN USE

eMoney Advisor VISIT
Leading financial planning software platforms that are increasingly incorporating AI for goal-based planning, scenario analysis, and personalized recommendations.

Betterment for Advisors VISIT
Robo-advisory platforms that also offer solutions for human advisors to manage client assets or use as part of a hybrid advice model.

Salesforce Financial Services Cloud VISIT
CRM platforms tailored for financial advisors, leveraging AI to provide client insights, automate workflows, and enhance client engagement.

ChatGPT VISIT

Generative AI models that can autonomously draft personalized client communications and reporting, from market updates to performance summaries.

Proprietary AI models (developed by large wealth management firms) VISIT

AI/ML models developed by large wealth management firms for internal use to predict client behavior, identify retention risks, and optimize client engagement strategies.

Compliance.ai VISIT

RegTech platforms that leverage AI for automated compliance monitoring, risk assessment, and regulatory intelligence in financial services.

§ 08 EXAMPLES 5 EXAMPLES

In practice

Ways people in this role are already using AI, and what they get from it.

Automate Portfolio Rebalancing

EXAMPLE 1

HOW Financial Planners will configure an AI-powered portfolio management system that autonomously monitors client portfolios. The AI will automatically rebalance assets to maintain the target allocation and perform tax-loss harvesting, reporting these actions for the planner's oversight.

GAIN Significantly reduces manual rebalancing time, optimizes tax efficiency, and ensures portfolios consistently align with client risk profiles.

Generate Personalized Financial Plans

EXAMPLE 2

HOW Financial Planners will orchestrate an AI financial planning platform. By inputting client demographics, income, expenses, and life goals, the AI will autonomously generate a comprehensive financial plan, including savings rates, investment allocations, and retirement projections.

GAIN Accelerates financial planning, provides highly customized and detailed plans, and frees up planner time for deeper client engagement on goals and values.

Identify Client Behavioral Biases

EXAMPLE 3

HOW Financial Planners will utilize an AI tool that autonomously analyzes client trading patterns, historical reactions to market volatility, and communication tone. The AI will identify specific behavioral biases (e.g., loss aversion, herd mentality) and provide the planner with insights for proactive coaching.

GAIN Empowers planners to provide more effective, targeted behavioral coaching, helping clients stick to their plans and avoid emotionally driven mistakes.

Draft Personalized Market Updates

EXAMPLE 4

HOW — Financial Planners can instruct a generative AI tool to draft a personalized market update for a client segment. By providing key economic highlights and portfolio performance, the AI will autonomously generate a concise, tailored message for the planner's review and sending.

GAIN — Streamlines client communication, ensures consistent and timely market insights, and allows planners to focus on high-touch interactions.

Predict Client Churn Risk

EXAMPLE 5

HOW — Financial Planners will leverage an AI model that autonomously analyzes client data (e.g., frequency of logins to client portal, decline in asset value, recent support tickets). The AI predicts which clients are at high risk of leaving, triggering proactive outreach strategies.

GAIN — Enables proactive client retention efforts, reduces churn rates, and strengthens client relationships by addressing concerns before they escalate.

§ 09 CONTEXT

How this role compares

Three neighbouring roles chosen to show the direction of travel.

Basic Portfolio Administrators / Investment Clerks (Transactional)

MORE EXPOSED

AI IMPACT — Catastrophic (AI and robo-advisors can autonomously handle account opening, basic rebalancing, and performance reporting for simple accounts.)

WORK MOVES TO — Immediate need for radical re-skilling into AI oversight, exception handling for complex transactions, or specialization in higher-value client service.

AI FinTech Developers / Quantitative Analysts (FinTech)

DIFFERENT SKILLS, GROWING

AI IMPACT — Foundational (They design and build the AI algorithms and platforms that power personalized financial advice and portfolio management.)

WORK MOVES TO — Deep expertise in advanced AI/ML algorithms, financial modeling, software engineering, and specific financial domain knowledge.

Behavioral Finance Coaches / Wealth Psychologists

COMPLEMENTARY, LESS EXPOSED

AI IMPACT — Low-Moderate Augmentation (AI assists in identifying biases, but core human empathy, trust-building, and psychological guidance are irreplaceable.)

WORK MOVES TO — Deep understanding of human psychology, behavioral finance principles, and the ability to build trust and provide empathetic, non-judgmental guidance.

§ 10 VERDICT

Closing judgement

> For Financial Planners, AI is not merely a tool but a radical force of transformation that will fundamentally redefine their role. It will autonomously handle the mundane, amplify planning precision, and streamline communication, compelling planners to pivot to indispensable human empathy, nuanced life planning, and profound ethical guidance. The future Financial Planner will be a visionary orchestrator of human-AI collaboration, providing irreplaceable connection at the heart of financial well-being.

§ 11 BASIS REVISED 5 OCTOBER 2026

Evidence and revisions

What the exposure figure rests on, what changed when it was last revised, and the published work cited for this role.

SCORE

65 to 69

WINDOW

2-5 years (unchanged)

The 5 October 2026 review moved the score up by 4 points.

Exposure Index v2. Inputs: task applicability 71/100 (Microsoft AI applicability score 0.36 for Personal financial advisors); observed usage 47/100 (Anthropic observed exposure 0.35); official exposure tier 100/100 (BLS: very high); labour-market trajectory 46/100 (BLS projects employment to grow 1.4% over 2025–35); published adoption rating 70/100 (high adoption). Weighted base 69.4. Final score 69. The previous figure of 65 was raised by 4 points, a small change that comes from moving off scores rounded to the nearest five. The change window is unchanged.

HOW THE FIGURE IS BUILT (EXPOSURE INDEX V2)

Task applicability — Microsoft Research, AI applicability score	71 × 35%	24.8
Observed usage — Anthropic Economic Index, observed exposure	47 × 20%	9.3
Official exposure tier — US BLS AI-exposure category	100 × 20%	20.0
Labour-market trajectory — US BLS projected employment change 2025–35	47 × 10%	4.7
Published adoption rating — This report's adoption level	70 × 15%	10.5
Weighted base		69.4
Exposure score		69

MEASURES BEHIND THE SCORE

US Bureau of Labor Statistics · *Employment Projections 2025–35 and AI Exposure Categories* (27 August 2026)

AI-exposure tier: Very high. Projected employment change 2025–35: +1.4%. Matched to Personal financial advisors.

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Microsoft Research · *Working with AI: Measuring the Applicability of Generative AI to Occupations* (10 July 2025)

AI applicability score 0.35 (percentile 98 of 785 occupations) for SOC 13-2052.

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Anthropic · *Anthropic Economic Index report: Cadences* (26 June 2026)

Observed exposure 0.35 for SOC 13-2052 (percentile 94 of 756 occupations).

PUBLISHER PDF

UK Department for Science, Innovation and Technology · *Assessment of AI capabilities and the impact on the UK labour market* (28 January 2026)

UK context: around 70% of UK workers are in occupations with tasks AI could perform or enhance, above the US average; a one-standard-deviation rise in exposure was associated with a 3.9% fall in UK job postings.

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§ 12 APPENDIX

Method and sources

Each report was written from a large body of published research. The exposure score itself is computed, not written: it is the CareerGuard Exposure Index, a weighted average of occupation-level measures from the US Bureau of Labor Statistics (AI-exposure classification and 2025–35 projections), Microsoft Research (AI applicability scores) and Anthropic (observed exposure), together with the adoption rating published on the report. The organisations and publications below are the standing literature behind the narrative sections. Every source, with dates, licences and archived copies where we are permitted to hold them, is catalogued in the research library.

Exposure Index v2 (October 2026). Each input is scaled to 0–100 and weighted: task applicability 35% (Microsoft AI applicability score ÷ 0.5), observed usage 20% (Anthropic observed exposure ÷ 0.75), official exposure tier 20% (BLS very high = 100, high = 70, moderate = 40, low = 10), labour-market trajectory 10% (50 2.5 × projected % employment change), published adoption rating 15% (very high = 85, high = 70, medium-high = 55, medium = 40, low-medium = 25, low = 10). Inputs not measured for an occupation are dropped and the remaining weights renormalised. An editorial adjustment of at most ±12 points is allowed only for automation channels the measures cannot see (robotics, self-service, machine vision, medical imaging, RPA/OCR, generative video) and is always logged with its reason. Scores are whole numbers, not rounded to five. The change window shifts one notch (a year at each end) per ten points of movement.

I GLOBAL AND MACROECONOMIC IMPACT OF AI ON WORK

World Economic Forum

The Future of Jobs Report series — Employer survey of expected job growth and decline, skill shifts and technology adoption (2020, 2023 and 2025 editions); Artificial Intelligence and the Future of Entry-Level Work (2026).
AI governance and transformation reports — Frameworks on ethical AI, talent strategy and industry transformation.

McKinsey Global Institute

AI, Automation and the Future of Work series — Research quantifying automation potential by task, sector and demographic, from "Jobs Lost, Jobs Gained" to "Agents, robots, and us" (2025).
Industry-specific reports — Financial services, healthcare, manufacturing and others.

PwC

Global AI Jobs Barometer — Annual analysis of job postings and productivity by AI exposure (2024–2026 editions).
Upskilling Hopes and Fears survey — Employee perceptions and readiness.

Microsoft Research and Anthropic

Working with AI (2025); Anthropic Economic Index (2025–2026) — Occupation-level usage data from Copilot and Claude conversations, the two observed-usage measures behind the 2026 revision.

Stanford Digital Economy Lab and Stanford HAI

Canaries in the Coal Mine? (2025–2026); AI Index Report (annual) — Payroll evidence on early-career employment in exposed occupations; annual measurement of AI capability, investment and adoption.

Deloitte

Human Capital Trends series — Workforce, talent and HR technology trends.
Tech Trends series — Emerging technologies and their business implications.

Accenture

Technology Vision series — Forward-looking analysis of emerging technology, with emphasis on AI.
Fjord Trends — Design, innovation and human experience in a digital world.

Boston Consulting Group

AI/ML insights and industry solutions — "The AI Revolution in the Workplace" and related research.

EY

AI and workforce reports — Adoption, talent strategy and ethics.

IBM Institute for Business Value

AI and automation studies — Business models, workforce evolution and leadership.

OECD

AI Policy Observatory — International data and policy on AI, labour markets and skills.
Employment Outlook — Labour-market trends including technological impact (2023–2026 editions).

International Labour Organization

Generative AI and Jobs: A Refined Global Index of Occupational Exposure (2025) — Task-level exposure gradients for every ISCO occupation; successor to the 2023 global index.

International Monetary Fund

Staff Discussion Notes on AI and work (2024, 2026) — Complementarity framing: where AI augments and where it substitutes.

UK Department for Science, Innovation and Technology

Assessment of AI capabilities and the impact on the UK labour market (2026) — UK occupational exposure and job-posting evidence.

Brookings Institution

AI and automation research — Economic and social implications, displacement and skills.

Yale Budget Lab and Goldman Sachs Research

Tracking the Impact of AI on the Labor Market; AI and the US labour market (2026) — Aggregate labour-market monitoring; macro displacement estimates.

Oxford University (Oxford Martin School)

The Future of Employment — Frey & Osborne and subsequent research on susceptibility to automation.

MIT Technology Review
AI & Work — Reporting on AI research and its implications for industries and jobs.

Gartner
Hype Cycle for Artificial Intelligence — Maturity and adoption of AI technologies.
Future of Work reports — Workplace models and talent strategy.

U.S. Bureau of Labor Statistics
Employment Projections 2025–35; AI Exposure Categories; Occupational Outlook Handbook — Ten-year employment projections and, from the 2025 cycle, an AI-exposure tier for every detailed occupation.

Indeed Hiring Lab
AI at Work Report (2025) and posting-market updates — Skill-level transformation estimates and job-posting trends by occupation.

II CORE AI AND MACHINE-LEARNING RESEARCH

OpenAI
Research papers, blog and API documentation — Large language models, generative AI, safety and societal impact.

Google DeepMind
Research papers and blog — Reinforcement learning, AI for science, AGI and ethics.

Meta AI
Research papers and blog — Large language models, computer vision, AI for social good.

Hugging Face
Transformers library and model hub — Open-source state-of-the-art NLP models.

TensorFlow and PyTorch
Documentation and community forums — Core frameworks illustrating practical capability.

arXiv
cs.AI, cs.LG, cs.CV, cs.CL — Pre-print research.

NeurIPS and ICML
Conference proceedings — Top-tier academic research.

ACM and IEEE
Journals and proceedings — ACM Computing Surveys; IEEE Transactions on AI.

Kaggle
Datasets and competition solutions — Applied machine learning on real-world problems.

The Alan Turing Institute
Research and reports — Responsible and applied AI.

III ETHICAL AND RESPONSIBLE AI DEPLOYMENT

NIST
AI Risk Management Framework — Voluntary framework for managing AI risk.

European Commission
AI Act — Risk-tiered legal framework for AI.
Ethics Guidelines for Trustworthy AI — Principles for responsible development.

Partnership on AI
Research and best practice — Responsible AI development.

AI Now Institute
Annual reports — Social implications: power, inequality, rights.

ACM FAccT
Proceedings — Fairness, accountability and transparency.

Data & Society
Publications — Social implications of data-centric technology.

WIPO
Conversation on IP and AI — Intellectual-property implications of AI.

IEEE Global Initiative on Ethics of A/IS
Ethically Aligned Design — Recommendations for ethical AI design.

Center for AI and Digital Policy
Policy briefs — Accountable AI policy.