

Vantage Consulting Partners – AI Cheat Sheet

Core AI & RPA Concepts

Artificial Intelligence (AI) – Machine-driven intelligence that analyzes data, learns patterns, and supports decision-making.

Machine Learning (ML) – A subset of AI where algorithms learn and improve automatically from data.

Deep Learning – An advanced form of ML that uses layered neural networks to process and interpret complex patterns.

Natural Language Processing (NLP) – Enables machines to understand, interpret, and respond to human language (e.g., client chatbots, meeting transcription).

Large Language Model (LLM) – A type of AI trained on vast amounts of text to generate human-like responses.

Generative AI – AI models that create new content, such as text, images, or code (e.g., client communication drafts, marketing materials).

Predictive Analytics – AI models that forecast future trends (e.g., portfolio risk, client attrition).

Robotic Process Automation (RPA) – Software “bots” that automate repetitive, rules-based tasks with speed and accuracy.

Why It Matters

AI and RPA together transform how firms operate—driving efficiency, precision, and scale while freeing advisors to focus on client relationships.

- **Boost Productivity** – Automate back-office tasks to give advisors more time for clients.
 - **Enhance Personalization** – Deliver tailored advice and communications at scale.
 - **Improve Compliance** – Automate monitoring, reporting, and documentation.
 - **Speed Up Service** – Accelerate onboarding, KYC, and transaction processing.
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Vantage Advantage

We align people, processes, and technology to deliver sustainable competitive advantage

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