



Vantara Consulting Group

AI STRATEGY · FRACTIONAL LEADERSHIP · GOVERNED EXECUTION

Less AI Complexity. More Business Value.

CAPABILITIES OVERVIEW

NEW YORK · VANTARACG.COM

Built for firms where judgment is the product.

Vantara is a New York-based AI strategy and fractional technology leadership firm for middle-market professional services, investment, and healthcare organizations, including law firms, accounting firms, private equity firms, and family offices.

Our clients are too regulated and reputation-sensitive for generic IT consultancies, and too pragmatic for Big Four engagements. We work exclusively in industries where confidentiality, fiduciary duty, and professional standards shape every technology decision. That focus means we arrive already fluent in how your firm operates, the workflows, the risk posture, and the client expectations, and design AI adoption that strengthens the practice rather than disrupting it.

Our engagements pair senior strategy with hands-on delivery: we advise at the partner and board level, then stay to implement, operate, and govern what we recommend.

Practitioner-led

Vantara is led by a technology executive with more than 20 years of enterprise leadership, including service as CIO, CTO, and Chief Digital Officer for law and accounting firms. Our counsel is grounded in real operating experience, not theory.

Governance-first

Every engagement is built on a governance foundation, so AI adoption satisfies partners, regulators, insurers, and clients from day one.

Where we work

PROFESSIONAL SERVICES

Law Firms

AI-enabled practice operations, legal technology strategy, and adoption programs that meet professional responsibility and client confidentiality standards.

PROFESSIONAL SERVICES

Accounting Firms

Intelligent automation across audit, tax, and advisory workflows, with the controls and documentation the profession requires.

INVESTMENT & WEALTH

Private Equity Firms

AI strategy for the firm and its portfolio: diligence acceleration, value-creation playbooks, and technology leadership on demand.

INVESTMENT & WEALTH

Family Offices

Discreet, right-sized technology and AI capability for organizations that prize privacy, continuity, and institutional-quality operations.

HEALTHCARE

Healthcare Organizations

AI that reduces documentation and revenue-cycle burden for independent practices and healthcare services companies, with HIPAA safeguards and clinicians in control.

Strategy, leadership, and delivery, from one accountable partner.



AI Strategy & Advisory

i.

AI ASSESSMENT • STRATEGY & ROADMAP • GOVERNANCELIFT™

We assess your firm's AI readiness, identify the use cases with genuine return, and build a practical adoption roadmap, from assistive tools to governed agentic workflows, sequenced by value, risk, and organizational capacity. Partners get a clear-eyed view of what AI will and won't do for the practice, and a plan the firm can actually execute.



Fractional Executive Leadership

ii.

CIO • CTO • CDO • CAIO

Seasoned C-suite technology leadership, embedded in your firm at the fraction of an executive hire. Your fractional executive owns the technology agenda, from vendor strategy and security posture to budget discipline and AI adoption, and is accountable to your partners, not to a product they're selling.



Managed AI Services

iii.

OPERATE • MONITOR • IMPROVE

Once AI is deployed, we run it. Vantara operates your firm's AI capabilities, including the agentic systems that act on your behalf, as an ongoing managed service: monitoring performance, managing vendors and models, maintaining governance controls, and continuously improving outcomes as the technology and your practice evolve.



Technology, Data & Modernization

iv.

DATA READINESS & ARCHITECTURE • APPLICATION MODERNIZATION • WORKFLOW ORCHESTRATION & AUTOMATION

The engineering behind the strategy. We build the data foundations and modern architecture that AI depends on, unifying the systems, repositories, and integrations where your firm's knowledge actually lives, because governed AI cannot run on yesterday's infrastructure. A hybrid onshore/offshore delivery model pairs boutique attention with mid-market economics, so recommendations become working systems without a second procurement cycle.



Cybersecurity Assessment

v.

ASSESS • AUDIT • PRIORITIZE

Independent cybersecurity assessments and security audits that measure your firm's posture against the standards your clients, carriers, and regulators expect, and give the partnership a prioritized, plain-language remediation roadmap.

Adopt AI with the confidence of a governed institution.

For regulated and reputation-driven firms, the question is not whether to use AI, it is whether you can demonstrate, to partners, clients, regulators, and insurers, that you use it responsibly. Vantara productized the answer.

PROPRIETARY

GovernanceLift™

A complete, ready-to-deploy AI governance program, engineered for professional services, investment, and healthcare organizations, installed and operationalized by Vantara.

POLICIES & CHARTER APPROVED

CONTROLS & TRAINING IN FORCE

AUDIT TRAIL & METRICS REPORTED

DAY 30 • READY

DAY 60 • LIVE

DAY 90 • PROVEN

Policy & Acceptable Use Framework

Firm-wide AI policies aligned to your professional obligations, client commitments, and risk appetite.

Risk & Vendor Controls

Structured evaluation of AI tools, models, and vendors, before they touch client data.

Oversight & Accountability Structure

Clear roles, review cadences, and escalation paths, from practice groups to the partnership.

Training & Adoption Enablement

Role-based training that turns policy into practice, and hesitant professionals into confident users.

Agentic AI Oversight

Human-in-the-loop controls, defined action boundaries, and audit trails for AI agents that act autonomously on the firm's behalf, so autonomy never outruns accountability.



Vantara's frameworks and methods are available through licensing arrangements for firms and partners who wish to build on our intellectual property within their own organizations, extending the same governed approach beyond the engagements we deliver directly.

Specialist depth. Executive accountability.

Vertical specialization

Five industries, known deeply, not forty industries, known casually. We speak the language of partnerships, funds, fiduciaries, and clinical practices.

Operating credibility

Led by a technology executive who has served as CIO, CTO, and Chief Digital Officer for law and accounting firms. We have held the roles we advise on.

Governance built in

Risk, compliance, and oversight are designed into every engagement from the start, not retrofitted after something goes wrong.

Strategy through operation

One accountable partner from roadmap to run-state. No handoff gap between the firm that advises and the firm that delivers.

How engagements begin



Assess

A focused AI assessment of your firm's data readiness, technology, workflows, risk posture, and highest-value AI opportunities.



Roadmap

A prioritized, partner-ready adoption plan, sequenced by return, governed by design, and sized to your firm.



Embed

Fractional leadership and managed services carry the roadmap into daily operation, and keep it improving.



Begin the conversation.

A brief introductory discussion is the fastest way to see whether Vantara is the right fit for your firm. We will tell you candidly if we are not.

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MEMBER, AWS PARTNER NETWORK