

Theoremlabs

Strategy &  
Advice

Design

propositions not self-evident  
..until proven

# Brief Introduction | Theoremlabs.io

- DIGITAL, AUTOMATION & MODERNIZATION ADVISORY
- APPLIED INNOVATION LABS [ART OF POSSIBLE LABS]

FEB 2025



**Theoremlabs.io** is a hybrid of **management consulting, build & experimentation labs** for Fintech products that apply advances in AI, Data, Cloud and mature Web 3 technologies.

Domain Pedigree:  
Wealth Management, Retirement & Annuities, Core  
Banking & PE-backed businesses



## Why Us? Our Special Sauce

Expertise, Innovation and Efficiency in the Age  
of AI

### Battle-Hardened Experts

We are engineers, product specialists, and domain experts first. With over 75 years of collective experience in the corporate world, we've been in your shoes and had a seat at the same tables you are at now. We have executed across various domains and solutions before launching [TheoremLabs.io](#).

### Risk-Literate Enthusiasm about AI

We view AI as a transformational force, comparable to the printing press, electricity, or the internet. While it's true business and societal impacts are still emerging, we believe the best course of action is to invest in continuous learning and applying AI to existing business workflows.

### Walk the Talk

We speak from experience. Our strategy and tech advisory services are backed by our Build & Experiment Labs, where we continuously learn by doing. Our team is a blend of Gray (seasoned professionals) and Green (fresh talent), ensuring innovative solutions grounded in practical knowledge.

### Lean and Agile Teams

As a startup, we prioritize frugality by defaulting to small pods of humans and AI (leveraging open-source or free-tier solutions). This approach naturally leads us to design our work and roles to maximize efficiency through AI-infused modern methods and architectures.

### Prime Location

Based in Charlotte, NC—a financial and insurance hub with a vibrant startup scene and a steady influx of seasoned and new talent. This location allows us to attract professionals seeking a balanced work and life environment.



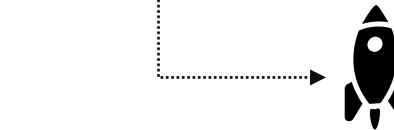
## Advisory & Consulting

We serve offices of CTO, CIO or CDOs

With Big Ideas & Strategic transformation heavy work.

Senior Practitioner roles such as Principal Architects,  
Data-AI-Automation Experts or Domain SMEs

Strategic Bets



## Art of Possible Labs & Engineering

We serve Executions Teams

With Applied Innovation via experiments & pilots , Accelerators.

Data-AI-Automation Engineers & CX Journey & UX Analysts

**Value Creation**

Tactical Intelligence from Labs

# Team



## Prashant Sarode, Co-Founder & Chief Technology Advisor

CTO @ Wealth Fintech. 20+ yrs. in Financial Services, held leadership positions in Product Engineering & Architecture. Inventor - Patent on White labeled Digital Workers system. Track record in turn-key modernization & reimagination of business products & operation models using mature capabilities Cloud, Automation & AI-ML.



## Wendie Hernandez, Co-Founder & Managing Partner

20+ years of financial service industry experience supporting both front & back-office roles. Holds multiple industry licenses, including FINRA Series-24 enabling supervisory of registered salespersons.



## David Ward, Chief Revenue & Growth Officer

25+ in Corporate Exec Leadership roles managing complex technology projects, overseeing teams of over 150 and handling budgets exceeding \$40 million. At LPL Financial, led successful implementation of crucial platforms, enhancing service and sales channels, and managing significant capital investments. At Wells Fargo Advisors Technology aligned & designed technological solutions with business strategies, significantly boosting operational efficiency and client satisfaction. His innovative and results-driven approach has been instrumental in driving substantial revenue growth and operational excellence.



## Shantanu Wadodkar, Co-Founder & Managing Partner

20+ years in Financial Services Technology. 401K/403B Administrative Services, Payments and Bill Payments. Very recently, he served as SVP at BNY-Mellon, and prior to that Paymentus & TIAA. His roles spanned from building top Dalbar-rated digital experiences for B2B channels as well as focusing scaling data platforms on clouds to support growth and stability objectives.



## Sukumar Subbaih, Managing Partner, Security Advisory

Cyber Security Field CTO and Principal Advisor, specializes in AI safety/security, governance, and compliance. With over 20 years of expertise, he empowers businesses to achieve financial benefits while operating in a safe, secure, and compliant manner. Leading cybersecurity initiatives for multinational corporations, Sukumar drives excellence and innovation in digital defense strategies. His robust solutions protect millions of customers and partners, and his implementation of large-scale global cyber controls enhances security for employees worldwide across diverse sectors.



## Will Storey, Co-Founder & Lab Mentor

Over 25 years of leadership and entrepreneurial experience with financial institutions, Will has a proven track record of driving growth and innovation. Will is focused on helping companies maximize process efficiency and return on investment through Web3, blockchain, cloud, AI/ML, and automation.



# Theoremlabs.io SKUs

Our business is a collection related SKUs.

Many SKU's are connected and itself may (at this times) not produce direct revenue but are triggering revenue in other SKUs.



## Services SKUs

Advisory & Consulting



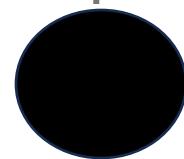
**AI-Automation SKU :**  
Automation & AI Advisory



**Modernization SKU:**  
Legacy System Upgrades & Modernization



**Implementation Partner SKU:**  
We prefer niche SaaS Fintech Platforms (e.g. Finzly, FinOps SaaS, Gynt.ai) or niche Tech-only service from Hyper-scaler Cloud Provider (e.g. AwS Sagemaker, MS CoPilot etc).



**Consulting Business.**  
Valued @ Services Business  
Multiple



## Innovation SKUs

Experimentation & Incubation Lab

- **Pre-packed Solutions SKU's :**  
Accelerators (Macro & Micro)

- **AI-Automation Lab as Service SKU's :**  
Subscribe an Experimentation Pod

- **Joint & Co-Innovation SKU:**  
Startup Incubation Service



**Innovation as Business.**  
Valued @ SaaS or Software  
Multiples or Lab multiples



# Advisory & Consulting

We support & serve offices of CTO, CIO or CDOs

And usually are introduced via senior consulting roles such as Principal Architects, Data -AI-Automation Experts or Domain SMEs

## Our Advisory SKUs

► **AI-Automation SKU :**  
Automation & AI Advisory

► **Modernization SKU:**  
Legacy System Upgrades & Modernization

► **Data and System transformation SKU:**  
Streaming Data for future, Digital Transformations / Modernization

► **Implementation Partner SKU:**  
With SaaS Fintech Platforms (e.g. Finzly, FinOps SaaS, Gynt.ai) or niche Tech-only service from Hyper-scaler Cloud Provider (e.g. AwS Bedrock Sagemaker, MS CoPilot etc).

## What we deliver

- Help establish AI Strategy for the firm and secure alignment and buy-in at MC/Board levels
- Help build Business case for Automation, Modernization, AI-ML & Cloud Programs for Financial Services
- Establish CoEs, Governance Frameworks and Community of Practices
- Assist in Product Discovery, Road-mapping & Development (Wires, Journeys, Design Domain Entities & Business Architecture elaboration for engineering)
- Build & train Program and implementation talent/teams

## How we deliver

### Discover Strategic Context

- Traditional
- Research (Domain, Competition, Market Ecosystem)
  - Discovery workshops
  - Existing Knowledge Assets

- Modern
- AI-assisted forensics of existing assets (Requirements Docs, Code-Repo's, Design Docs, Customer Complaints Calls, Release Notes)

### Establish Strategy Hypothesis & Conduct Validation Experiments

*"If we do this X then we will benefit Y"*

### Convert Strategy into Execution Plan

**Exit or Continue to Manage execution**



# Select Work Portfolio

## Private Equity-backed Wealth Management Hub

### Profile:

- **Industry:** Financial Services, Wealth Management
- **Company Type:** Independent Wealth Hub
- **12K Advisors, 2M+ Investors, \$2.5B Revenue**

### Problem / Opportunity Space:

PE Firm leverage buy-out of 14 different broker-dealers with goal of streamlining business operations & increase profitability. Exit goal : return 4X MOIC for investors.

### Our Work:

#### Advisory , Design & Implementation Services:

Defined strategy & approach to streamline costs and scale of call-centers via modernization and as well as by digitization of self -server Advisor and Client channels. Established Reference Architecture for modernization of core business processes—kill paper process, replace with Automation Bots (aka Digital Labor). Conducted Technology & Application Rationalization and Datacenter to cloud migrations roadmaps. Turn-key contract for Sales Performance & Incentive Tech-Platform.

#### Core Strategies :

- Automation to scale Service and Operations
  - Turn On-Prem Data Center CapEx into predictable Cloud Infrastructure
  - Experiment & Innovate using Theoremlabs.io (new AI and Data Digital Experience)



Advisory & Consulting



# Select Work Portfolio

## Digital only Retail Bank

### Profile:

- **Industry:** Mid-sized Regional bank
- **Company Type:** Direct Bank
- **2M+** Deposits Customers

### Problem / Opportunity Space:

No Cost & Revenue Transparency. MC-committee was making decisions based on gut and hear-say (not backed by accurate data facts)

### Our Work:

#### Design & Implementation Services:

Discovered core customer journeys & mapped cost contributors (People Service & Ops, Tech Costs and 3rd party providers). Built Data pipelines to connect desperate cost & data source systems. Designed & Implemented real-time Data Driven Signals & Action-Dashboard for Management Committee & Board

#### Core Strategies :

- You can't manage what you can't measure
- Connect & Automate Data from sources that were previously un-connected
  - Data Stories NOT Traditional Reports
  - Data lead Actions NOT just Analytics
  - Digital Co-Pilot NOT Outsourced Human Ops



Advisory & Consulting



# Select Work Portfolio

Venture funded Low-Code AI SaaS Platform Company

## Profile:

- **Industry:** Tech
- **Company Type:** Palo Alto based Low-Code Automation and AI SaaS platform (contender to UiPath, AutomationAnywhere, Unqork)

## Problem / Opportunity Space:

Company had no Wealth Management Customers & wanted to land their platform into to Wealth Segment via **portfolio of wealth Apps**

## Our Work:

### Advisory & Design :

Helped Chief Product Officer in defining first-wave of GTM Wealth Apps (NAO, Money Movement, Compliance and Death Event Processing). Defined Ux , architecture for their implementation internal teams

### Core Strategies :

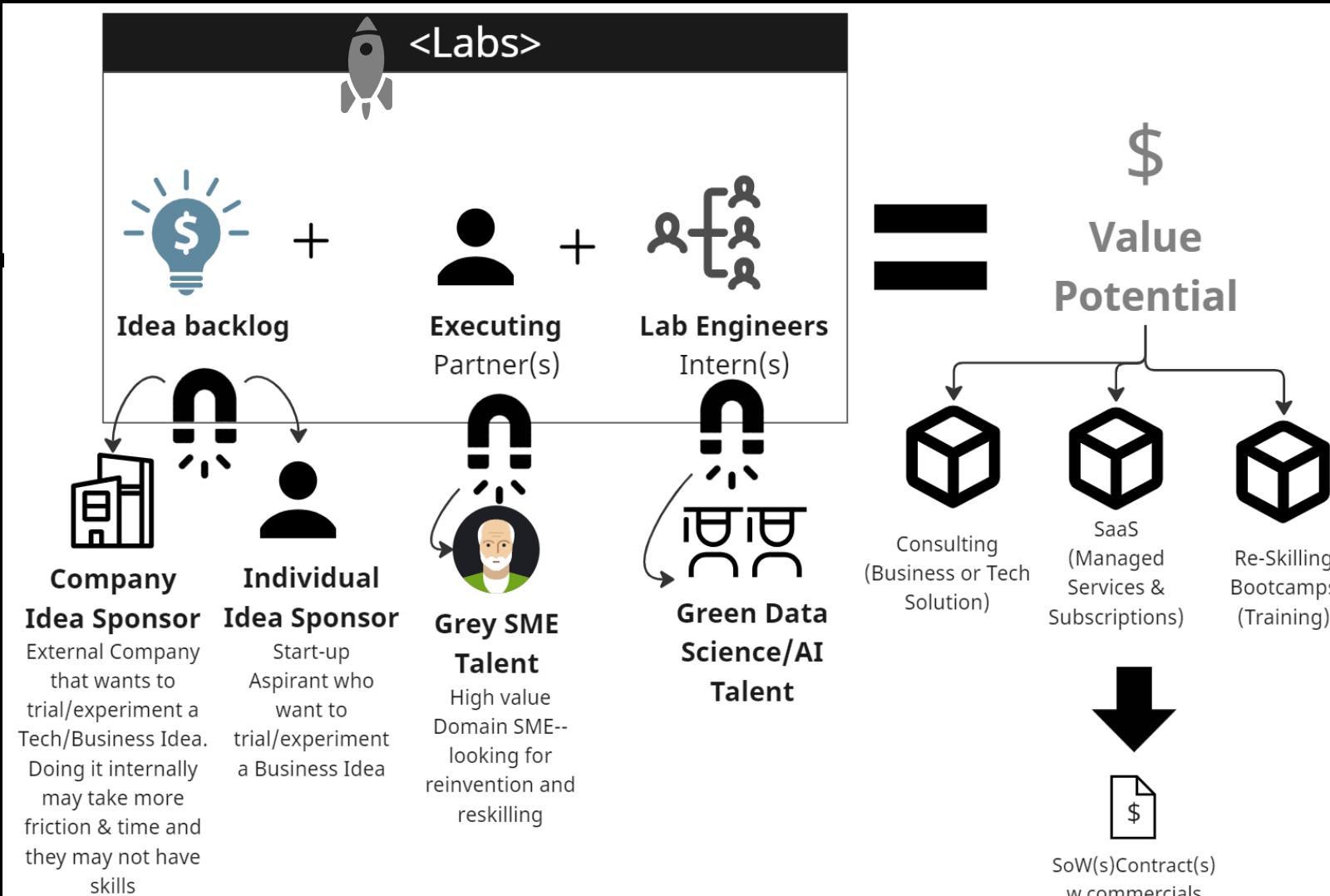
- Land and expand
- Lead with Domain specific ready-to use Apps then with power of broader platform



Advisory & Consulting

# Art of Possible Labs

Our own private version of Y-Combinator—a different take





# Art of Possible Lab

Strategy informed by build experiments seeking to validate break-through business and technology ideas...before committing big capital spend.



**Experiments turned into Accelerators**



**API Backlog is focus**

Open-Source & Hyper-scaler Digitization

RAGs & Private Knowledge stores

Synthetic Data

Agents

**Exploit Change in Unit Economics :**  
Unit Economics of Digitization may be changing as feature-set of incumbent premium automation platforms are now available in open-source models with much higher quality

**Use private knowledge to make LLM do enterprise valued tasks:**  
Foundational models without private knowledge of Enterprise have limited use and value.

**Synthetic fast-track AI-Use cases:**  
Most companies don't have data suitable for AI Projects. In addition, PII policies further adds to friction to and subsequent graduation to production.

**Automating Enterprise workflows steps that need cognitive judgment:**  
Agentic AI will impact how we solve workflow and coordination heavy business processes.

Tech Stack:

LangChain, Lama-series models, ChromaDB, GraphdB, Apache Airflow, Streamlit, AwS-S3, AwS-EC2, AwS-Bedrock, AwS-Step functions, Various Python frameworks (Faker, SDV, PDF-Plumber etc)



# AI-Areas we have expertise and/or building

## 1. Foundation Models & Architectures

- Transformer-based Models (OpenAI, LLaMA, Claude, Mistral)
- Diffusion Models (Stable Diffusion, DALL-E)
- Encoder-Decoder Models (T5, BERT for pretraining)
- Multi-modal Models (Gemini, GPT-4V)
- Models optimized for Text-2-SQL.

## 2. Prompt Engineering & Optimization

- Zero-shot, One-shot, Few-shot Learning
- Chain of Thought (CoT) Reasoning
- ReAct (Reasoning + Acting)
- Self-Consistency & Tree of Thoughts (ToT)
- System & User Prompts (Role-based interactions)

## 3. Retrieval-Augmented Generation (RAG)

- Context-Window + Vector dB patterns
- Query + VectordB + Graph

## 4. Vector Databases & Embeddings

- Chromadb, Pinecone, Open Search
- OpenAI, Hugging Face, Cohere Embeddings

## 5. Orchestration, Knowledge Bases & Augmented Memory Frameworks

- LangChain & LlamaIndex for knowledge retrieval
- Graph Databases (Neo4j)
- Context Windows & Sliding Memory
- MS Co-Pilots and AwS Bedrock

## 6. Synthetic Data & Data Augmentation

- Data Generation for Fine-tuning (GPT-Synthesized Data)
- Simulated User Conversations & Task Automation (Function Calling)
- Adversarial Data Augmentation

## 7. Model Fine-Tuning & Customain Domain Adaptation

- Parameter Efficient Tuning (LoRA, QLoRA, PEFT)
- RLHF (Reinforcement Learning from Human Feedback)

## 8. Model Deployment & Scaling

- AWS Bedrock, MSFT Azure, Google Vertex AI
- AWS EC2 GPU Clusters (NVIDIA Triton, Ray Serve)
- API-based LLM Integration

## 9. AI Agents & Workflow Orchestration

- AwS Bedrock, MSFT Bot-framework + MS CoPilot Studio
- LangChain Agents (Function Calling, Memory)
- Event-driven AI Pipelines

## 10. Guardrails, AI Ethics & Security

- AI Bias Detection & Explainability
- Responsible AI & Content Moderation

# APPENDIX

# Products in flight



kirdar.ai

Kirdar.ai is a flexible employee training simulator designed to improve customer-facing roles. It offers risk-free, real-world practice, reducing onboarding time and costs while enhancing employee readiness and identifying skill gaps. The platform prioritizes data privacy and provides actionable analytics to track progress and optimize training. Key benefits include improved customer satisfaction, increased sales conversions, and reduced employee turnover. Ultimately, Kirdar.ai aims to revolutionize employee training through customizable scenarios and scalable solutions.

- Design Partnership
- Go to Market Phase
- Compliance Review



DataGaze.ai

DataGaze is an AI-powered tool designed to make data analysis simple and intuitive by converting natural language queries into SQL, allowing users to extract actionable insights from their data without technical expertise. Whether you're running sales and marketing campaigns or preparing for CXO Meetings, DataGaze enables you to "gaze" deeply into your data and make smarter decisions—quickly and effectively.

# What Makes Kirdar.ai Unique?



## The Traditional Training Dilemma

**Time-Consuming** Onboarding new employees can take 12-18 months in industries like financial services to become fully proficient. This leads to wasted time and resources.

**Costly** The average cost of onboarding a new financial advisor is \$10,000 to \$50,000, creating significant budget strain. If your employees aren't prepared, it leads to high turnover thus starting the hiring cycle over.

**Inconsistent** Current training methods often lack "real world" customer scenario's, and leaving your new reps vulnerable and your customers frustrated with not getting the answer(s) they deserve.

## Kirdar.ai: The Solution

**Reduced Training Time** Kirdar.ai reduces training time by 150+ hours per trainee, getting them ready faster, while reducing the mentoring burden on senior staff.

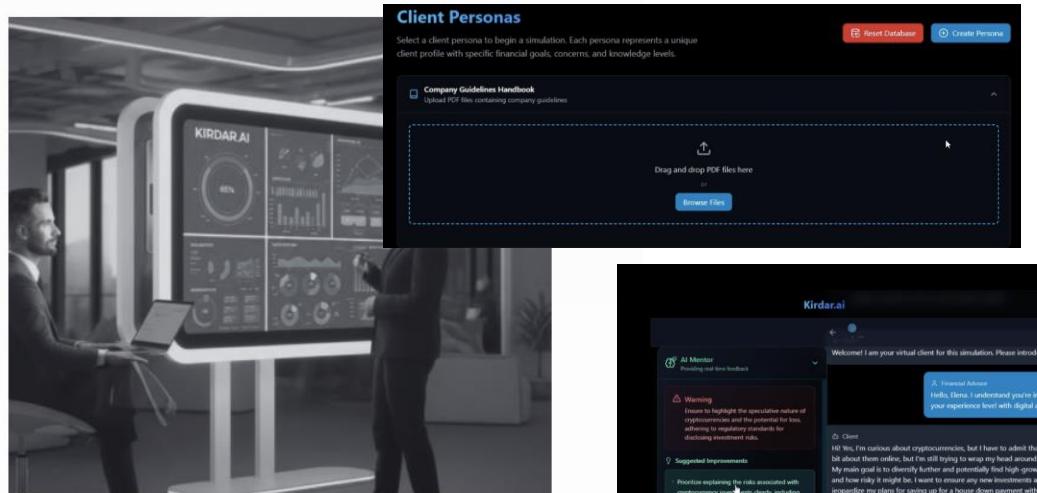
**Risk-Free Practice** Employees can practice handling real-world challenges in a safe environment, building confidence and preparedness, with LIVE feedback to company handbook policies and procedures.

**Identifies Skill Gaps** Kirdar.ai pinpoints areas where employees need additional training, enabling targeted skill development. Kirdar can also provide your training staff with a summary where most of the employees struggle, allowing you to adjust your training.

## Scalability and Customizable Scenarios

Kirdar.ai adapts to your organization's evolving needs, from onboarding new hires to refining experienced staff. Tailor training simulations to your industry's unique challenges and specific needs.

The screenshot shows the Kirdar.ai platform's user interface. At the top, there are navigation links: Home, Management, Client Personas, Scenario Challenge, and a sign-in area for Kirdar.ai. Below this is a large central area with a dark background and white text. It features a speech bubble icon and the text "Kirdar.ai" and "Master the Art of Advisory". A sub-section titled "Train with AI personas to perfect your client interactions and elevate your financial advisory practice" is displayed. There are two interaction boxes: one from a user asking about market volatility and another from an AI persona responding with investment advice. To the right, there are three columns for "Investment Advisor Client", "Early Retirement Planning Client", and "Estate Planning Client", each with detailed profiles and "Start Simulation" buttons.



This screenshot shows a "Client Personas" section with a "Company Guidelines Handbook" upload area. Below it is a "Recent Activity" section with a message: "No recent activities found. Start a scenario to begin tracking your progress!". The main part of the screen shows a "Welcome back, Aadit" message and a "Kirdar.ai" interface. It includes a "Monitor Active" button, a timestamp (1:44), and a "End Session & Evaluate" button. The interface shows a conversation between a "Client" and an "AI Monitor". The client asks about cryptocurrencies, and the AI provides information and suggests improvements. The AI also sends a message to the client, encouraging them to consider crypto ETFs.

This screenshot displays an "AI-Powered Performance Evaluation" report. It starts with an "Overall Performance" section showing a score of 5.0/10. Below it, a detailed analysis of the advisor's performance is provided, mentioning a basic understanding of investment options and empathy. The report then breaks down performance into categories: Technical Knowledge (6.0/10), Communication (5.0/10), Empathy (7.0/10), Risk Management (4.0/10), Compliance (3.0/10), and Key Strengths. Each category includes a brief description of the advisor's performance and any specific strengths or areas for improvement.



### What is DataGaze?

DataGaze is an AI-powered tool designed to make data analysis simple and intuitive by converting natural language queries into SQL, allowing users to extract actionable insights from their data without technical expertise. Whether you're running sales and marketing campaigns or preparing for CXO Meetings, DataGaze enables you to “gaze” deeply into your data and make smarter decisions—quickly and effectively.

#### **Key Benefits:**

- Simplifies data analysis with natural language queries.
- Empowers non-technical users to extract insights.
- Eliminates reliance on technical staff for data requests.
- Enhances decision-making speed and effectiveness.

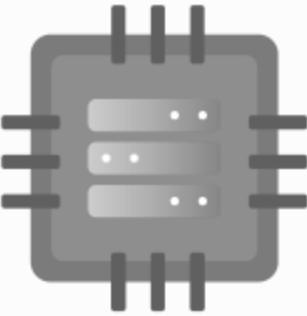
#### **Product Features:**

- Converts natural language into SQL queries.
- Integrates data from multiple databases effortlessly.
- Generates detailed reports in various formats.
- Supports diverse sectors, including sales, marketing, and education.

#### **Who will benefit:**

- Business Analysts:
- Small and Medium Businesses (SMBs):
- Marketing and Sales Teams:
- Educational Institutions:
- Customer Support Teams:
- Financial Institutions:
- In general, organizations that prioritize data access for non-technical employees and want to minimize the need for SQL expertise would be ideal customers for your product.

# Accelerator: Insight Bridge



## **Key Benefits:**

- Streamlines legacy system integration during M&A.
- Enhances understanding of complex workflows.
- Reduces operational inefficiencies and risks.

## **Product Features:**

- Combines proprietary methodology with AI tools.
- Analyzes, extracts, and documents workflows.
- Automates system knowledge extraction.
- Provides actionable insights for stakeholders.

**InsightBridge** is a comprehensive accelerator **process** that combines a proprietary business knowledge forensics methodology with AI-driven tools to unlock deep insights into legacy systems. This product and methodology blend is specifically designed to address the complexities of system knowledge extraction and documentation.

Tailored for businesses navigating mergers and acquisitions, **InsightBridge** systematically analyzes, extracts, and documents workflows across legacy commission systems. It has been successfully deployed to streamline integration processes for 14 broker-dealers brought together through M&A.

The solution enhances understanding of intricate legacy workflows, identifying critical integration points and reducing operational inefficiencies. By leveraging AI, **InsightBridge** delivers automated system knowledge extraction, enabling faster, more accurate documentation.

This accelerator not only facilitates smoother transitions during system integration but also provides stakeholders with actionable insights, reducing risk and optimizing resource allocation. **InsightBridge** transforms legacy system challenges into opportunities for streamlined operations and strategic growth.

# Accelerator: Synthetic Edge



**SyntheticEdge** is a cutting-edge accelerator designed to solve the critical challenge of data unavailability and PII constraints in AI projects. This tool generates high-quality synthetic data that mimics real-world scenarios while ensuring compliance with data privacy regulations. By eliminating reliance on actual sensitive data, SyntheticEdge enables organizations to fast-track AI use case development from testing to production. With its robust simulation capabilities, SyntheticEdge creates production-like datasets that are statistically and contextually accurate, offering a seamless alternative to traditional data scrambling. This ensures AI models are trained and validated with realistic yet non-identifiable data. The platform is designed to empower businesses to simulate complex test cases and edge scenarios effortlessly, accelerating the development and deployment cycle. Whether it's for predictive analytics, machine learning, or large-scale AI systems, SyntheticEdge delivers scalable, secure, and high-quality synthetic data solutions tailored to meet diverse industry needs.

## **Key Benefits:**

- Overcomes data unavailability and privacy constraints.
- Accelerates AI project development.
- Ensures compliance with data privacy regulations.

## **Product Features:**

- Generates high-quality synthetic data.
- Simulates realistic, production-like datasets.
- Offers robust simulation capabilities.
- Tailors solutions for various industry needs.

# Accelerator: Prompt Line



## **Key Benefits:**

- Enhances customer interactions with AI.
- Reduces operational overhead.
- Provides 24/7 reliable customer support.

## **Product Features:**

- Answers FAQs and schedules appointments.
- Reports issues and tracks inquiries.
- Integrates seamlessly with existing workflows.
- Handles high call volumes efficiently.

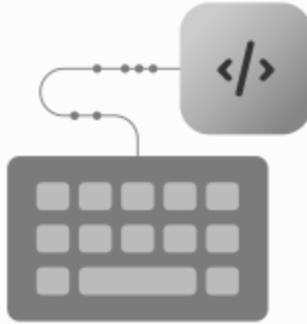
**PromptLine** is an intelligent conversational AI accelerator designed to revolutionize customer interactions and streamline business operations over the phone. Built for businesses across various industries, **PromptLine** provides a simple yet powerful solution for managing everyday customer needs.

With its advanced AI capabilities, **PromptLine** can answer frequently asked questions (FAQs), help schedule appointments, report issues, track inquiries, and provide updates—all through intuitive voice or text-based interactions. This enables businesses to offer prompt and accurate responses, improving customer satisfaction while reducing operational overhead.

**PromptLine** seamlessly integrates with existing workflows, ensuring businesses can efficiently manage operations without requiring extensive training or technical expertise. It empowers teams to focus on complex tasks while leaving routine customer interactions to the AI.

Whether it's handling high call volumes or ensuring 24/7 availability, **PromptLine** provides a reliable, user-friendly, and scalable conversational AI solution, driving operational efficiency and enhancing customer experiences

# Accelerator: Knowledge Pulse / Smart PDF



KnowledgePulse is an advanced AI-driven accelerator designed to transform your internal data into a dynamic, living knowledge resource. Acting as a smart guide, it powers FAQs, product documentation, and support materials, enabling quick access to critical information. Whether you need to generate help content on the fly or deploy a responsive chatbot, KnowledgePulse bridges the gap between data and actionable insights. It seamlessly connects your teams, customers, and business processes to the knowledge they need—faster and more efficiently. By converting static information into an interactive knowledge ecosystem, KnowledgePulse helps businesses learn, adapt, and respond in real time. Empower your organization to move beyond traditional documentation and embrace a knowledge-driven future.

## **Key Benefits:**

- Transforms static data into dynamic knowledge.
- Enables quick access to critical information.
- Enhances organizational learning and adaptation.

## **Product Features:**

- Acts as a smart guide for FAQs and documentation.
- Generates help content and deploys responsive chatbots.
- Connects teams to actionable insights.
- Converts information into an interactive ecosystem.

# Accelerator: Adaptive Fraud Detection



The **Adaptive Fraud Detection System** is an innovative solution designed to dynamically adjust to evolving fraudulent activities. By leveraging Generative AI, this system continuously refines its detection models, ensuring timely identification of new and sophisticated fraud patterns. Integrating AWS Bedrock enhances its capabilities, providing a robust foundation for scalable and efficient fraud detection. This adaptive approach not only improves detection accuracy but also reduces false positives, safeguarding businesses against potential financial losses.

- *Data Ingestion*
- *Data Storage*
- *Feature Engineering*
- *Model Training and Inference*
- *Generative AI Integration*
- *Real-Time Detection*
- *Monitoring and Feedback Loop*

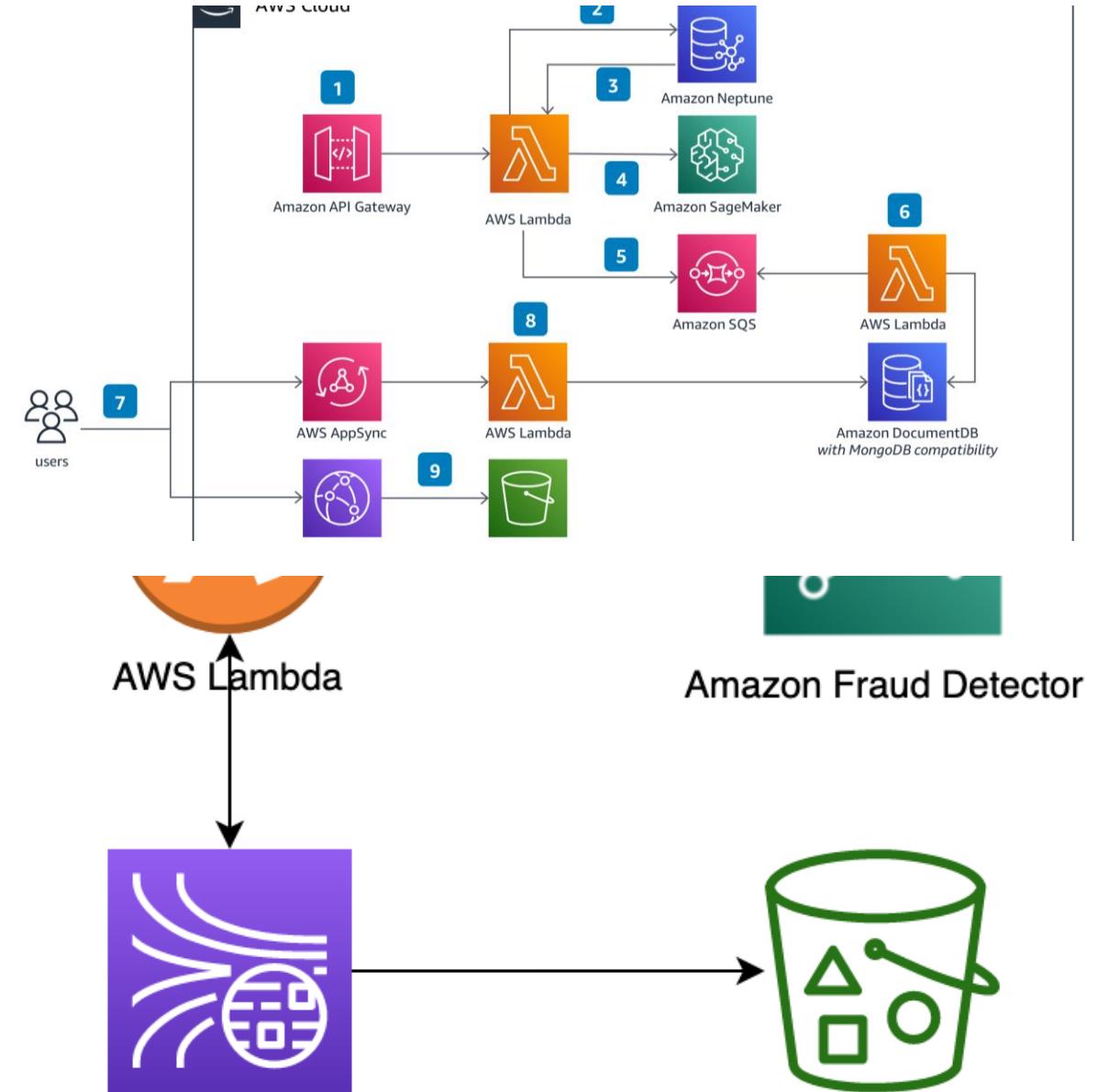
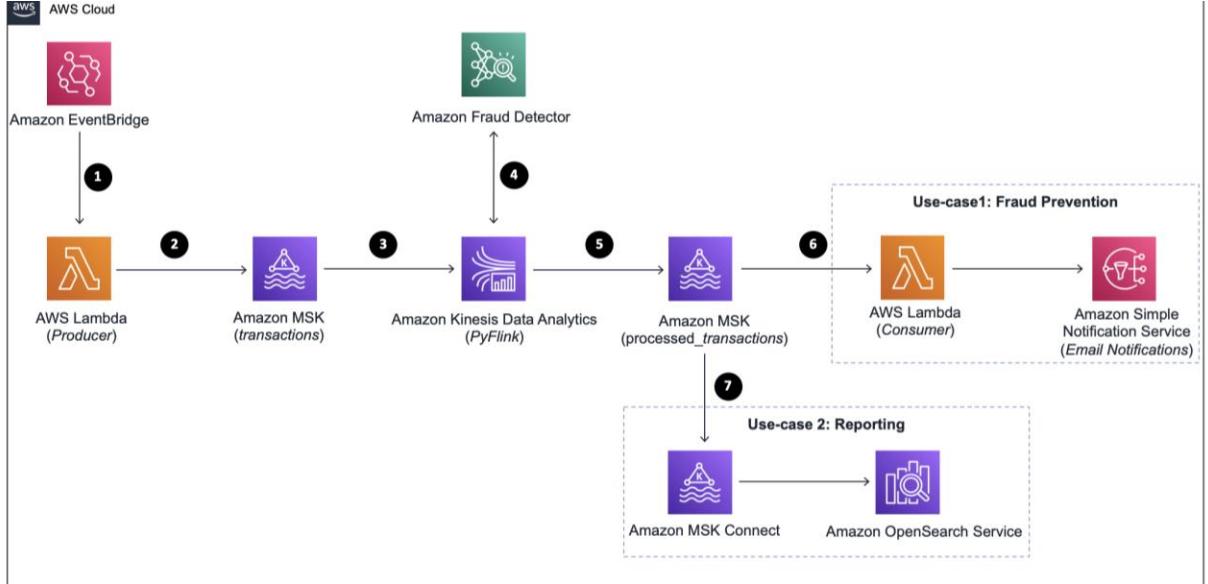
## **Key Benefits:**

- Adapts to evolving fraudulent activities.
- Improves detection accuracy and reduces false positives.
- Safeguards businesses against financial losses.

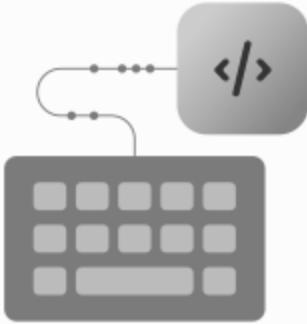
## **Product Features:**

- Leverages Generative AI for model refinement.
- Integrates with AWS Bedrock for scalability.
- Provides real-time fraud detection.
- Includes monitoring and feedback loops.

Anti Money Laundering



# Accelerator: Reconcile Helper AI



## **Key Benefits:**

- Accelerates reconciliation workflows.
- Improves data accuracy and reduces costs.
- Empowers organizations to focus on strategic growth.

## **Product Features:**

- Automates data ingestion and matching.
- Detects anomalies in real-time.
- Manages exceptions intelligently.
- Generates comprehensive reconciliation reports.

**Reconcile Helper AI** is an advanced AI-powered reconciliation accelerator designed to transform traditional reconciliation processes with unparalleled speed, accuracy, and efficiency. Developed by Theoremlabs Innovation Labs, ReconcileAI leverages the power of Generative AI (Gen AI) to streamline data matching, automate exception handling, and reduce manual effort across industries.

## **Key Features:**

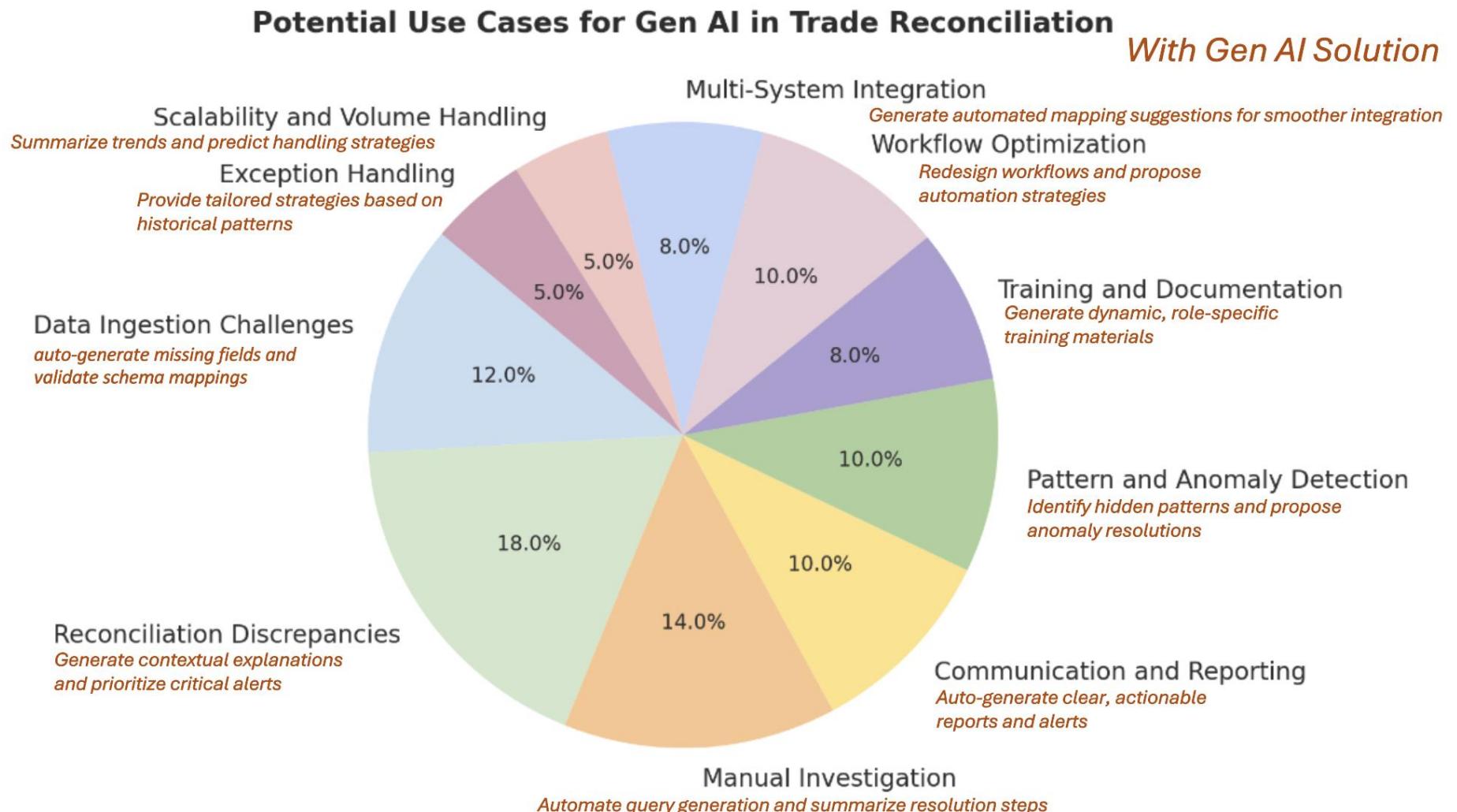
- **Automated Data Ingestion & Matching:**
- **AI-Driven Anomaly Detection:**
- **Intelligent Exception Management:**
- **NLP-Powered Reporting:**
- **Continuous Learning:**

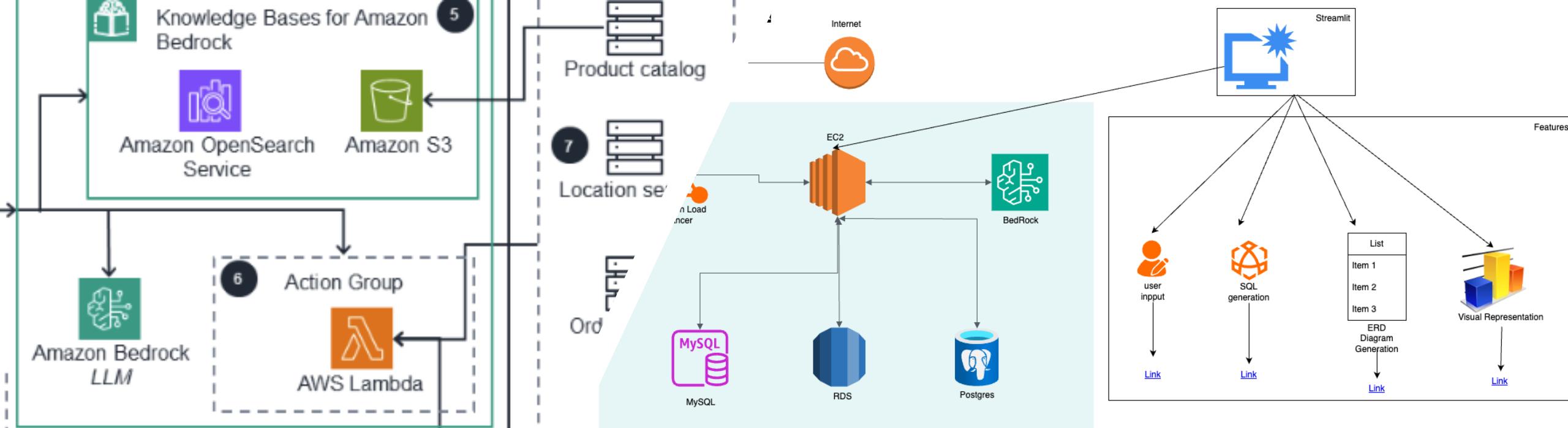
## **Why ReconcileAI?**

ReconcileAI helps businesses accelerate their reconciliation workflows, improve data accuracy, and reduce operational costs. Whether reconciling financial transactions, inventory, or data across systems, ReconcileAI delivers faster, smarter, and more reliable outcomes—empowering organizations to focus on strategic growth.

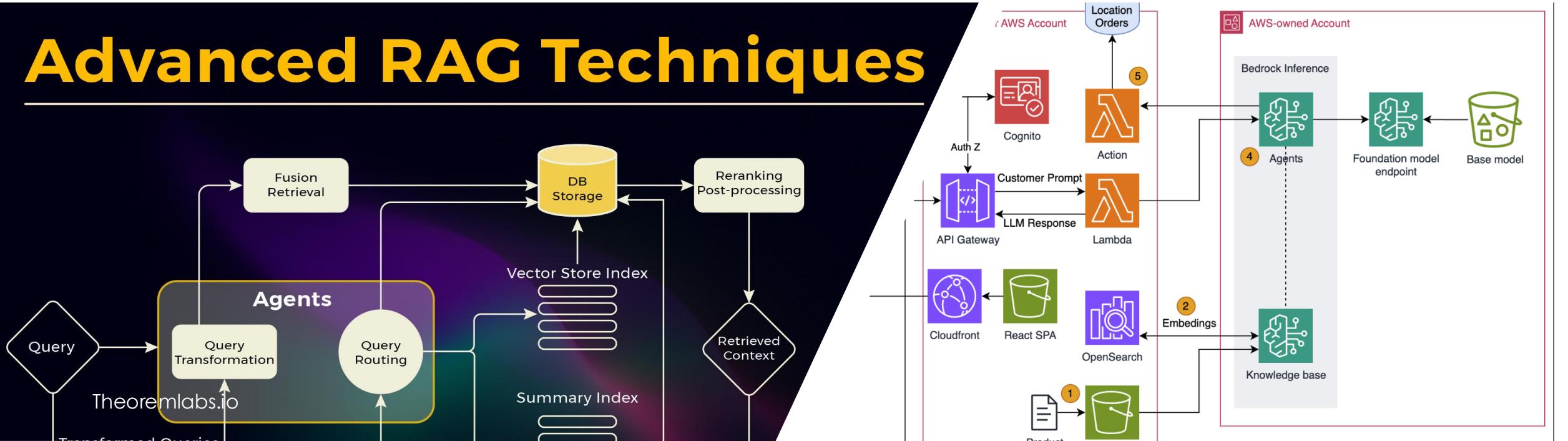
**Reconcile Smarter. Operate Faster. Innovate with ReconcileAI.**

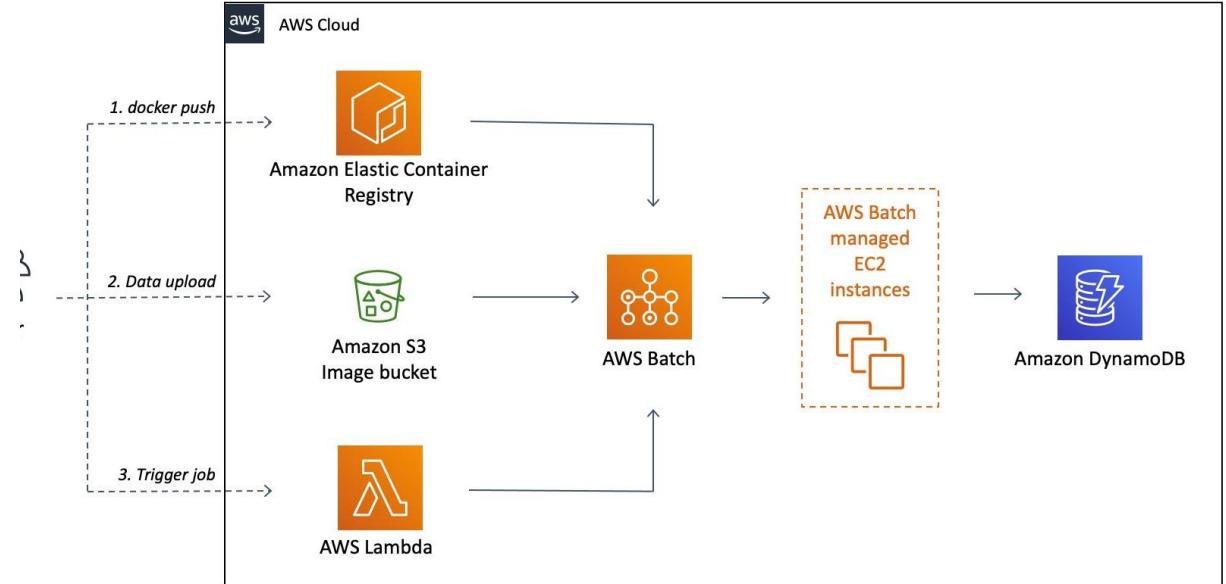
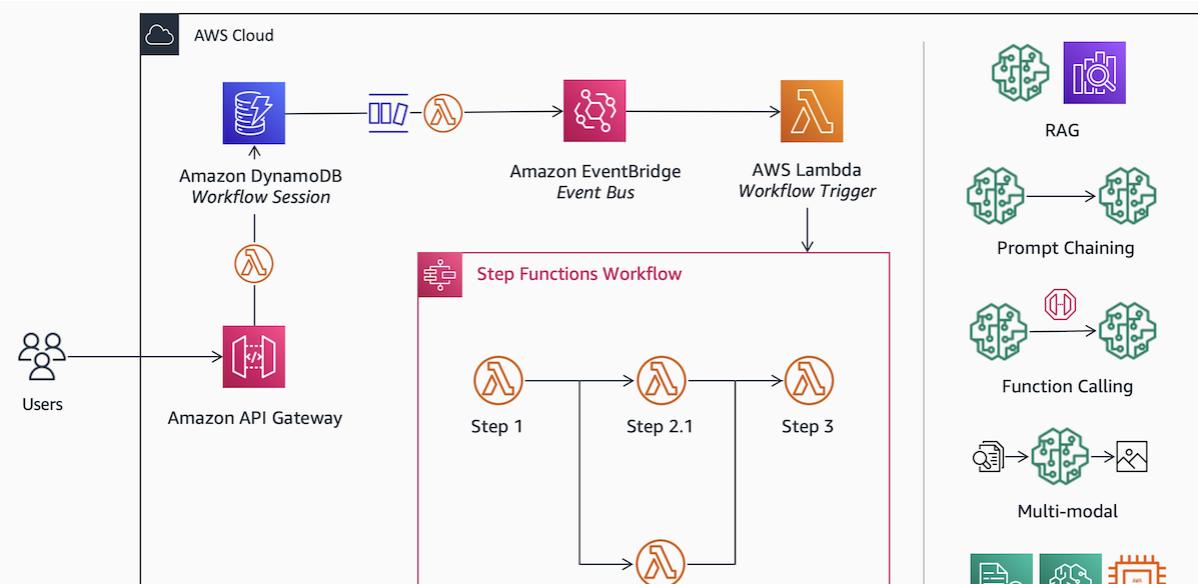
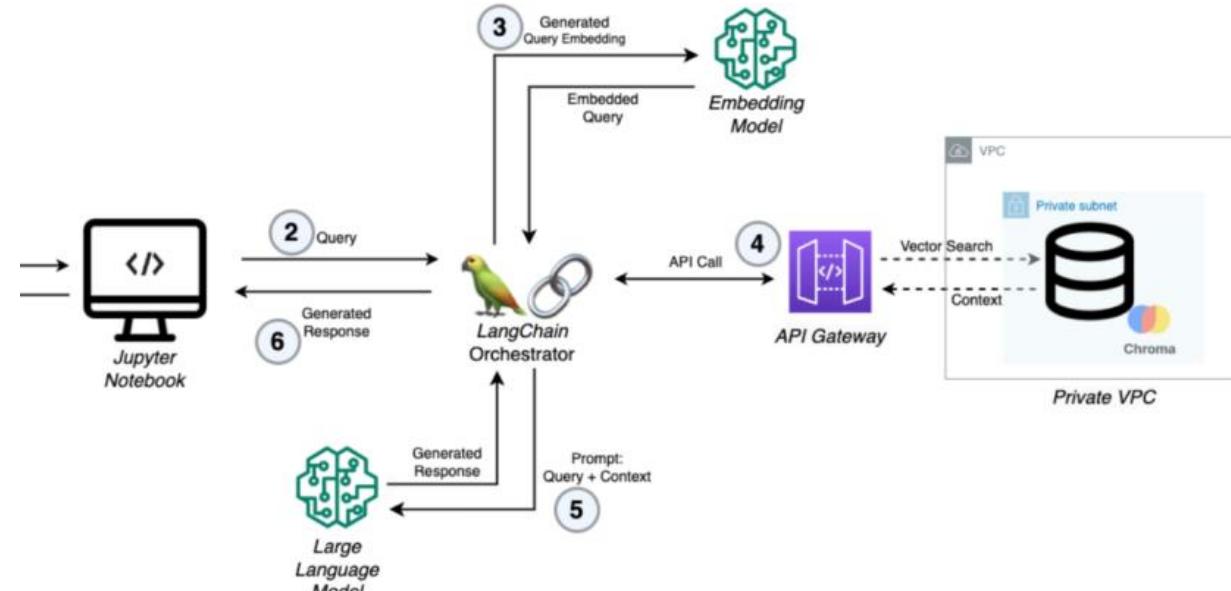
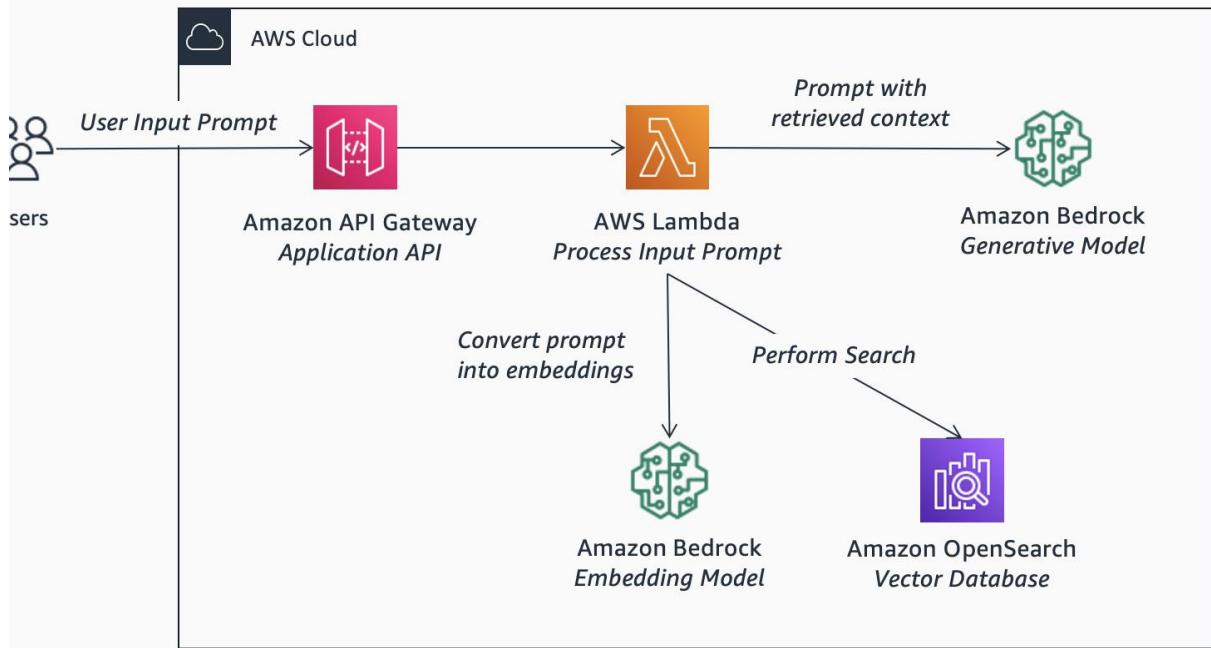
Potential use cases for Gen AI in the trade reconciliation process. Each segment highlights a specific problem area and its relative significance in the overall process.





# Advanced RAG Techniques





# APPENDIX



ally

TIAA

LPL Financial

WELLS  
FARGO

TRUIST

The logo for USAA, featuring a stylized blue "M" shape composed of wavy lines, with the word "USAA" in blue capital letters to its right and a registered trademark symbol (®) at the top right of the "A".

Moody's Citi

The logo for Vanguard, featuring a black silhouette of a three-masted sailing ship above the word "Vanguard" in red capital letters, with a registered trademark symbol (®) at the end of the word.

The logo for UNC Charlotte, featuring a white stylized "U" and "C" intertwined, with the words "UNC CHARLOTTE" in white capital letters below it.

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