

LucaAgent - Platform Overview

AI-Powered Tax & Accounting Intelligence

Professional-grade AI assistance for tax professionals, auditors, and financial advisors

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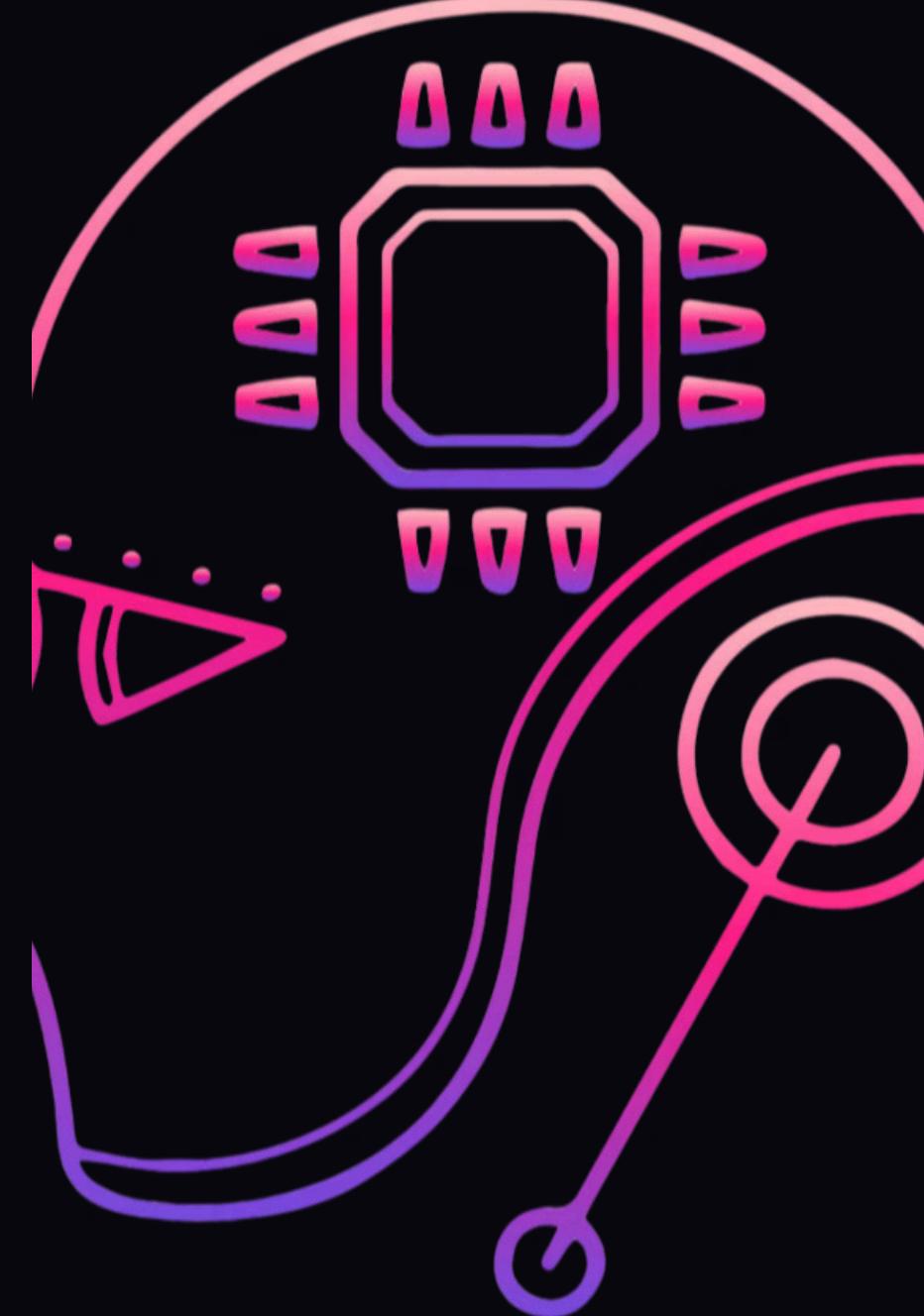


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Tools for teams to collaborate seamlessly on tax and accounting tasks

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Robust security measures and compliance features to protect sensitive financial data

FREE TRIAL

Subscription Plans & Pricing

Tier: FREE

Core Features

- 500 queries per month
- Basic document analysis (10/month)
- 1 profile
- Export to TXT, CSV
- Community support

Scenarios: 0 | Deliverables: 0



Perfect for individuals exploring AI-powered tax and accounting assistance

Subscription Plans & Pricing

Tier: PLUS

3,000 Queries/Month

Unlimited document analysis with priority support

5 Profiles

Manage multiple business or personal profiles

All Export Formats

Export to Word, PDF, Excel, PowerPoint, CSV, TXT

Advanced Features

Regulatory Scenario Simulator (10/month) + Client Deliverable Composer (10/month)

Multi-Currency Pricing

USD

Monthly: \$29.00

Annual: \$261/year

INR

Monthly: ₹799

Annual: ₹7,199/year

AED

Monthly: AED 99

Annual: AED 891/year

CAD

Monthly: CAD \$35

Annual: CAD \$315/year

25% savings

25% savings

25% savings

25% savings

Subscription Plans & Pricing

Tier: PROFESSIONAL



Unlimited Queries

No restrictions on AI interactions



Unlimited Documents

Process as many documents as needed



Unlimited Profiles

Manage unlimited business profiles

24/7

Priority Support

Round-the-clock chat assistance

Premium Features

- API access for integrations
- Forensic Document Intelligence
- Early access to new features
- White-label reports

Pricing Examples

USD: \$49/month or \$441/year

INR: ₹1,499/month or ₹13,499/year

TRY: ₺1,499/month or ₺13,491/year



Subscription Plans & Pricing

Tier: ENTERPRISE



Multi-User Accounts

6+ users with collaborative features and SSO/SAML authentication for enterprise security



Dedicated Support

Personal account manager with dedicated support channel and 99.9% SLA guarantee



Custom Solutions

Custom AI model training, on-premise deployment option, and custom export templates



Advanced Analytics

Usage analytics dashboard with comprehensive insights and reporting capabilities

- Everything in Professional tier included** plus enterprise-grade features designed for large organizations with complex requirements.

Enterprise Pricing

USD: \$499/month

Annual: \$4,491/year

INR: ₹14,999/month

Annual: ₹134,991/year

IDR: Rp 2,490,000/month

Annual: Rp 22,410,000/year

AI Chat Modes

10 Specialized Conversation Modes

Standard Mode

ID: standard

Use Case: Default conversational AI for general tax and accounting queries

Deep Research Mode

ID: deep-research

Agents: 8 specialized agents
Use Case: Chain-of-Thought reasoning with multi-source research and citations for complex regulatory analysis

Checklist Mode

ID: checklist

Agents: 9 specialized agents
Use Case: Generates actionable compliance checklists for tax filing preparation and tracking

Workflow Mode

ID: workflow

Agents: 5 specialized agents
Use Case: Generates visual workflow diagrams for process documentation and procedure visualization



AI Chat Modes (Continued)



Audit Plan Mode

ID: audit-plan

Agents: 14 specialized agents including RiskAssessor, FraudDetector, MaterialityCalculator

Use Case: Comprehensive audit preparation with multi-agent planning and risk assessment



Calculation Mode

ID: calculation

Agents: 5 financial calculators

Features: NPV, IRR, Tax Liability, Depreciation, ROI, Break-Even Analysis with Excel generation

Use Case: Tax calculations and financial modeling



Scenario Simulator Mode

ID: scenario-simulator

Agents: 12 specialized agents

Features: Monte Carlo simulations for regulatory scenarios

Use Case: Regulatory impact modeling and risk analysis

Advanced AI Chat Modes



Deliverable Composer

36 Specialized Agents for professional document generation including audit reports, tax opinions, advisory letters, and financial models

Forensic Intelligence

8 Investigation Agents for fraud detection, pattern analysis, anomaly identification, and document forensics

Roundtable Mode

6 Expert Agents simulating multi-expert discussion for complex decisions requiring multiple perspectives

Deliverable Composer Capabilities

Document Types

- Audit reports with executive summaries
- Tax opinions with legal citations
- Advisory letters with recommendations
- Financial models with sensitivity analysis

Agent Categories

- Executive summary generators
- Legal citation builders
- Risk assessment writers
- Financial projectors

Export Formats

6 Professional Document Export Options



Microsoft Word (.docx)

MIME Type: application/vnd.openxmlformats-officedocument.wordprocessingml.document

Library: docx

Use Case: Professional reports, memos, and formatted documents



PDF (.pdf)

MIME Type: application/pdf

Library: pdfkit

Use Case: Final deliverables, client-ready documents, archival



Microsoft Excel (.xlsx)

MIME Type: application/vnd.openxmlformats-officedocument.spreadsheetml.sheet

Library: exceljs

Use Case: Financial calculations, data analysis, schedules



PowerPoint (.pptx)

MIME Type: application/vnd.openxmlformats-officedocument.presentationml.presentation

Library: pptxgenjs

Use Case: Client presentations, board reports



CSV (.csv)

MIME Type: text/csv

Library: Native

Use Case: Data export, spreadsheet import, integration



Text (.txt)

MIME Type: text/plain

Library: Native

Use Case: Simple text output, universal compatibility

Financial Calculators

Comprehensive Tax and Financial Calculation Tools

Tax Calculations

- Corporate Tax (US, Canada, UK)
- Tax Liability Calculator
- Federal tax computation
- State/Provincial estimation
- Effective rate calculation

Time Value of Money

- NPV (Net Present Value)
- IRR (Internal Rate of Return)
- Payback Period
- Profitability Index
- Discounted cash flow analysis

Depreciation Methods

- Straight-Line Depreciation
- Double Declining Balance
- Sum-of-Years Digits
- Full schedule generation
- Accumulated depreciation tracking

Advanced Financial Analysis

Loan Calculations

- Amortization Schedules
- Payment calculation
- Principal vs Interest breakdown
- Balance tracking

Financial Ratios

- Current Ratio
- Quick Ratio
- Debt-to-Equity Ratio
- ROE (Return on Equity)
- ROA (Return on Assets)

Investment Analysis Tools: ROI Calculator, Break-Even Analysis, Sensitivity Analysis, and Monte Carlo Simulation with 10,000 iterations default for comprehensive risk modeling.

Accounting Integrations

Seamless Connection to Major Accounting Platforms

QuickBooks Online

Authentication: OAuth 2.0
Features: Token exchange & refresh, company info retrieval, transaction sync
Security: AES-256-GCM encrypted credential storage

Xero

Authentication: OAuth 2.0
Features: Token exchange, multi-tenant support
Security: Secure credential storage with automatic token refresh

Zoho Books

Authentication: OAuth 2.0
Scope: ZohoBooks.fullaccess.all
Features: Full access token exchange and management

Integration Infrastructure

Secure Storage

AES-256-GCM encryption for all credentials with master key management via AWS KMS, Azure Key Vault, or HashiCorp Vault

Automatic Refresh

Token refresh automation ensures uninterrupted connectivity

Health Monitoring

Connection health monitoring with error handling and retry logic

Security Features

Military-Grade Security Infrastructure

Encryption: AES-256-GCM

Algorithm: Military-grade AES-256-GCM encryption

Key Management: Per-file encryption keys with master key management via AWS KMS, Azure Key Vault, HashiCorp Vault, or secure environment variables

Application: All sensitive data encrypted at rest and in transit

Virus Scanning

Local: ClamAV daemon for real-time scanning

Cloud: VirusTotal API and AWS S3 Malware Protection

Response: Automatic quarantine of infected files with admin alerting on threats

Authentication & MFA

Session-based authentication with secure session management

MFA/2FA: TOTP support (Google Authenticator, Authy compatible)

Backup Codes: 10 backup codes per user

Protection: Account lockout after failed attempts

HTTP Security Headers (Helmet)

- HSTS (HTTP Strict Transport Security)
- Content Security Policy
- X-Frame-Options
- X-Content-Type-Options
- X-XSS-Protection
- Referrer-Policy
- CSRF Protection (token-based)
- Strict CORS Configuration

Document Processing

Unlock the Value in Every Document with AI

Secure Upload

Automatic format validation ensures your documents are ready for processing, supporting various file types like PDFs, images, and office documents.

Security Scanning

Multi-layer security scans protect against threats, ensuring all uploaded files are safe and clean.

Bank-Grade Encryption

Military-grade encryption safeguards your data before storage, providing maximum security for every file.

Intelligent Extraction

AI-powered extraction accurately pulls text and data from any document, including tables and form fields, streamlining information retrieval.

Smart Analysis

Advanced AI processing analyzes extracted content, providing comprehensive and actionable insights from your documents.

Key Capabilities

- Extract text from scanned documents
- Detect and extract tables
- Identify form fields automatically
- Understand document structure
- Extract key information

Jurisdictions & Multi-Currency Support

Global Tax Calculation and Pricing

Tax Calculation Jurisdictions

21%

United States

Federal corporate tax rate (post-TCJA) plus ~6%
average state tax

15%

Canada

Federal general rate plus ~11% average
provincial tax

25%

United Kingdom

Main corporate tax rate

Multi-Currency Support (6 Currencies)

USD (\$)

United States Dollar

INR (₹)

Indian Rupee

AED (₾)

UAE Dirham

CAD (C\$)

Canadian Dollar

IDR (Rp)

Indonesian Rupiah

TRY (₺)

Turkish Lira

Multi-User Profile System & GDPR Compliance

Flexible Profile Management with Complete Data Privacy

Profile Types

Personal

Individual tax and finance management (one per user, enforced by unique constraint)

Business

Company accounts with unlimited profiles

Family

Household finances with multiple profiles

Member Roles

- **Owner:** Full control
- **Admin:** Manage members, view all
- **Member:** Create/view own content
- **Viewer:** Read-only access

Relationships: Spouse, Child, Parent, Other

GDPR Compliance

Consent Management

Explicit consent recording with consent type tracking, timestamp logging, and consent history retrieval

Data Export

Full user data export in JSON format including conversations, profiles, and analytics

Account Deletion

Complete account deletion with cascade delete of all related data and audit log entry

Audit Trail

All GDPR actions logged with action type, timestamp, IP address, and resource tracking

Platform Capabilities

Everything You Need in One Place



10 Specialized Modes

From standard chat to forensic intelligence



6 Export Formats

Word, PDF, Excel, PowerPoint, CSV, Text



6 Global Currencies

USD, INR, AED, CAD, IDR, TRY



4 Subscription Tiers

Free, Plus, Professional, Enterprise



Unlimited Profiles

Organize work by client, project, or team



Multi-User Collaboration

Work together with your team

Built for tax professionals, auditors, and financial advisors who demand excellence

Real-Time Features

Instant AI Responses and Live Collaboration



Token-by-Token Streaming

Watch AI responses appear in real-time as they're generated



Live Progress Updates

See calculation and document generation progress as it happens



Instant Feedback

Get immediate responses to your questions



Seamless Experience

No waiting, no delays - just instant intelligence





Conversation Management

Organize and Share Your Work Effortlessly



Smart Organization

Create, rename, and pin important conversations



AI-Powered Titles

Automatic conversation naming based on content



Easy Sharing

Generate secure share links for collaboration



Context Preservation

Conversations remember your context and continue seamlessly



Feedback System

Rate responses to improve your experience