

# LucaAgent - Platform Overview

## AI-Powered Tax & Accounting Intelligence

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

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# 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

<b>3,000 Queries/Month</b> Unlimited document analysis with priority support	<b>5 Profiles</b> Manage multiple business or personal profiles
<b>All Export Formats</b> Export to Word, PDF, Excel, PowerPoint, CSV, TXT	<b>Advanced Features</b> Regulatory Scenario Simulator (10/month) + Client Deliverable Composer (10/month)

## Multi-Currency Pricing

USD	INR	AED	CAD
<b>Monthly:</b> \$29.00	<b>Monthly:</b> ₹799	<b>Monthly:</b> AED 99	<b>Monthly:</b> CAD \$35
<b>Annual:</b> \$261/year	<b>Annual:</b> ₹7,199/year	<b>Annual:</b> AED 891/year	<b>Annual:</b> 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



## 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

		
<b>Deliverable Composer</b> <b>36 Specialized Agents</b> for professional document generation including audit reports, tax opinions, advisory letters, and financial models	<b>Forensic Intelligence</b> <b>8 Investigation Agents</b> for fraud detection, pattern analysis, anomaly identification, and document forensics	<b>Roundtable Mode</b> <b>6 Expert Agents</b> 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:** pdftkit

**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

<div>21%</div> <div>United States</div> <div>Federal corporate tax rate (post-TCJA) plus ~6% average state tax</div>	<div>15%</div> <div>Canada</div> <div>Federal general rate plus ~11% average provincial tax</div>	<div>25%</div> <div>United Kingdom</div> <div>Main corporate tax rate</div>
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## Multi-Currency Support (6 Currencies)

<div>USD (\$)</div> <div>United States Dollar</div>	<div>INR (₹)</div> <div>Indian Rupee</div>
<div>AED (د.إ)</div> <div>UAE Dirham</div>	<div>CAD (C\$)</div> <div>Canadian Dollar</div>
<div>IDR (Rp)</div> <div>Indonesian Rupiah</div>	<div>TRY (₺)</div> <div>Turkish Lira</div>



# 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

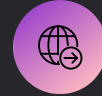
# Platform Capabilities

Everything You Need in One Place



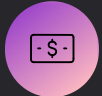
## 10 Specialized Modes

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





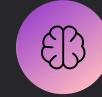
# Conversation Management

Organize and Share Your Work Effortlessly



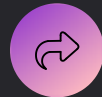
## Smart Organization

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