

# **Accute: AI-Native Practice Management for Accounting Firms**

Revolutionizing accounting workflow automation through artificial intelligence. Unlike legacy competitors that retrofit AI onto manual features, Accute was architected from day one with AI as its foundation—enabling unprecedented automation capabilities that fundamentally transform how accounting firms operate.





# The Fundamental Difference

## Legacy Competitors

Manual forms, workflows, and inbox features requiring constant human operation. AI added as an afterthought to existing systems—retrofitted onto decades-old architecture that wasn't designed for intelligent automation.

## Accute's AI-Native Approach

Specialized AI agents automate every feature from the ground up. Intelligence built into the platform's DNA, not bolted on later. Every workflow, form, and communication channel designed for AI-first operation.

# Roundtable: Multi-Agent Orchestration

## 2 Years Ahead of the Market

Accute's revolutionary Roundtable system coordinates multiple AI agents to complete complex tasks automatically. While competitors offer single-purpose AI assistants, Accute orchestrates entire workflows where agents communicate, share context, and collaborate—just like a team of expert accountants working together.

**Example:** "Process new client onboarding for Acme Corp" → Roundtable automatically coordinates Forma to create intake forms, Relay to send them via email, Parity to extract returned data, Echo to validate submissions, Cadence to set up workflows, Scribe to draft engagement letters, and Relay to send for signature. All without human intervention.



# Platform Capabilities



## Roundtable Multi-Agent Orchestration

Coordinate multiple AI agents for complex tasks—exclusive feature 2 years ahead of market



## 16+ Specialized AI Agents

Installable agents for every accounting function via Agent Marketplace



## 10,000+ Professional Templates

Extensive accounting template library covering all entity types and jurisdictions



## Multi-Provider AI Flexibility

OpenAI, Azure, Anthropic—seamless integration with automatic failover



## Developer-First Design

Full REST APIs, webhooks, and open architecture for custom integrations



## Global Payment Coverage

Built for emerging markets with Razorpay—160+ countries, multi-currency

# Multi-Provider AI Architecture

01

## OpenAI

GPT-4, GPT-4 Turbo, GPT-3.5 for high-quality general-purpose tasks and complex reasoning

02

## Azure OpenAI

Enterprise-grade with custom deployments, enhanced security, and compliance features

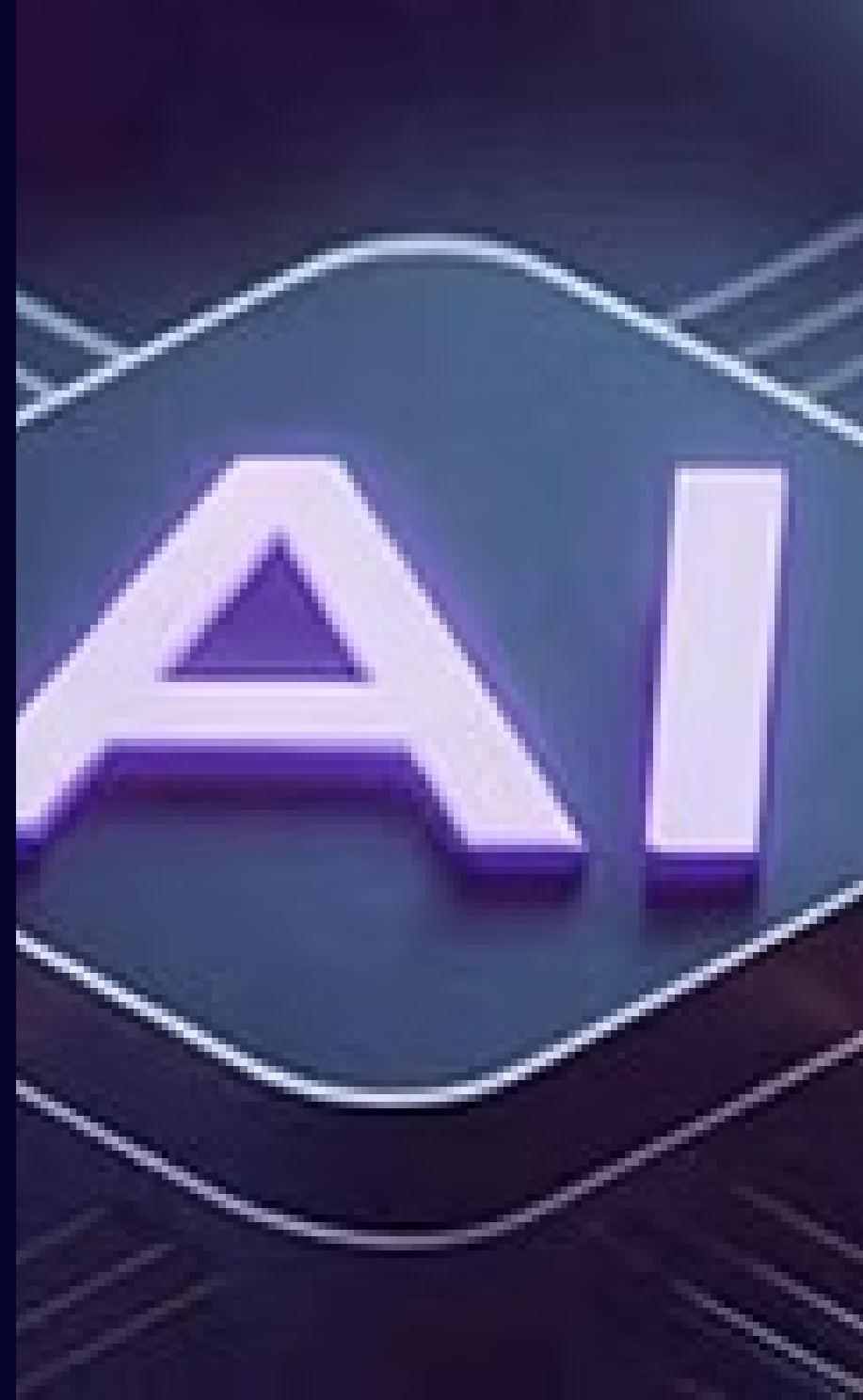
03

## Anthropic Claude

Claude 3 Opus, Sonnet, Haiku for nuanced understanding and ethical AI responses

Accute provides **automatic failover**—if one provider is down, seamlessly switch to backup. **Cost optimization** routes requests to the most cost-effective provider based on task complexity. **Per-organization configurations** allow different teams to use different providers based on their needs and budget.

- **Competitors:** TaxDome uses a single AI provider with no choice. Karbon has no true AI integration. Canopy and SafeSend have no AI capabilities whatsoever.



# AI Agent Marketplace & 16+ Pre-Built Agents



Browse and install specialized AI agents like apps on a smartphone. Accute's Agent Foundry enables dynamic agent registration without code changes—a manifest-driven architecture that makes the platform extensible without platform redeployment.



## Luca - Conversational Assistant

Project management assistant that understands natural language queries and provides intelligent responses



## Cadence - Workflow Specialist

Automates workflow creation, assignment, progression, and exception handling with intelligent decision-making



## Forma - Form Generation

Creates custom intake forms, tax organizers, and questionnaires from natural language descriptions



## Parity - Document Analysis

Extracts structured data from tax forms, bank statements, and financial documents automatically



## Echo - Data Validation

Validates data for accuracy, completeness, and consistency with cross-reference checking



## Relay - Communication Automation

Smart email drafting, context-aware responses, automated follow-ups, and sentiment analysis



## Scribe - Document Drafting

Generates engagement letters, tax memos, and client communications with professional formatting

## Quill, Canvas, Beacon

AI-powered content generation, website layout automation, and SEO optimization

Third-party developers can create and monetize custom agents through the marketplace with multiple pricing models: free, monthly subscription, yearly subscription, per-instance, per-token usage, one-time purchase, and hybrid combinations.

# Roundtable in Action: Real-World Scenario

User: "Process new client onboarding for Acme Corp"



All coordinated automatically, with context flowing between agents. No manual coordination required. This feature alone puts Accute 2+ years ahead of any competitor in AI automation.

# Military-Grade Security & Enterprise Features



## AES-256-GCM Encryption

- **Bank-level data protection** with zero-knowledge architecture
- **PKI digital signatures** (RSA-2048) for document integrity
- **Enterprise data isolation** with cryptographic separation
- **Multi-provider SSO/SAML** (Okta, Azure AD, Google Workspace)
- **50+ RBAC permissions** with granular access control
- **Complete audit trail** with millisecond-accurate logging

Pursuing SOC 2 Type II and ISO 27001 certifications to provide third-party validation of security practices.

# Target Market & Competitive Advantage

## Geography

**10 Global Regions:** USA (primary), India, UAE, Turkey, UK, EU, Australia/NZ, Singapore, SE Asia, Africa

## Firm Size

**5-5000 users:** Forward-thinking, tech-savvy, growth-focused firms that are early adopters of AI

## Services

**Full-service firms:** Tax preparation, bookkeeping, audit, advisory, CFO services

## Competitive Comparison

Feature	Accute	TaxDome	Karbon
AI Architecture	✓ Native, multi-provider	⚠ Retrofitted, single	□ No AI
AI Agent Marketplace	✓ 16+ agents	□ Basic assistant	□ None
Roundtable Orchestration	✓ Exclusive	□ None	□ None
Developer APIs	✓ Full RESTful	⚠ Limited	⚠ Limited
Payment Gateway	✓ Razorpay (global)	⚠ Stripe only	⚠ Stripe only
Pricing (USA)	\$35-125/user	\$50-70/user	\$59-99/user

# Pricing Strategy & The Bottom Line

		
<b>Core Plan</b> <b>\$35/month</b>  Essential workflow automation with RBAC, forms, workflows, document management, client portal	<b>AI Plan (Most Popular)</b> <b>\$75/month</b>  AI-powered automation with 6 AI agents, marketplace access, multi-provider AI, email integration	<b>Edge Plan</b> <b>\$125/month</b>  Roundtable orchestration coordinating all agents simultaneously—2 years ahead of market

**Global Coverage:** 10 regions with Purchasing Power Parity (PPP) pricing. **Billing Cycles:** Monthly, Yearly (Save 20%), 3-Year (Save 30%). **Volume Discounts:** Up to 25% off for 100+ seats.

## Why Choose Accute

### For Investors

- **AI-native architecture** with 2-year competitive moat
- **Emerging market focus** (India, UAE, Turkey) where competitors don't operate
- **20-40% lower pricing** with superior capabilities
- **Modern tech stack** (React, Express, PostgreSQL)
- **Developer-friendly** with full APIs and extensibility
- **10,000+ template library** for rapid deployment

### The Bottom Line

**Accute is the world's first AI-native accounting workflow automation platform.** For firms that prioritize legacy integrations over AI innovation, traditional competitors may be better suited (for now).

**But for forward-thinking firms ready to transform their practice with artificial intelligence, Accute is the only choice.**



# Integration Ecosystem & API Platform



## Full RESTful API

Comprehensive documentation for seamless development and maximum flexibility.



## Real-time Webhooks

Instant event notifications for critical data changes and immediate action.



## Pre-built Integrations

Connects with QuickBooks, Xero, Drake, Lacerte, ProSeries, and more.



## No-Code Automation

Empowering users with Zapier and Make.com support for effortless workflows.



## Agent Development SDK

Extend platform functionality with a powerful Software Development Kit.



## Secure Authentication

Industry-standard OAuth 2.0 for robust and secure access control.



## Rate Limiting & Analytics

Monitor, control, and optimize API consumption with detailed insights.



## Developer Sandbox

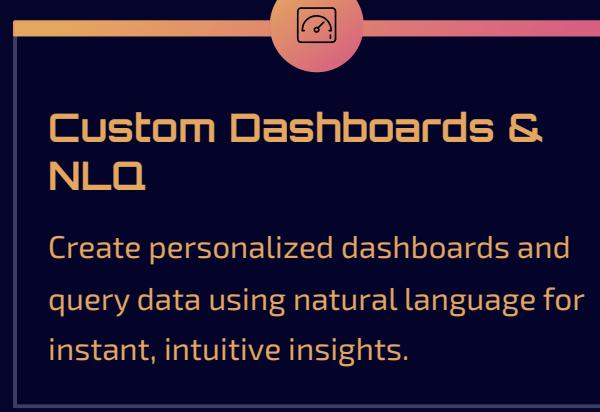
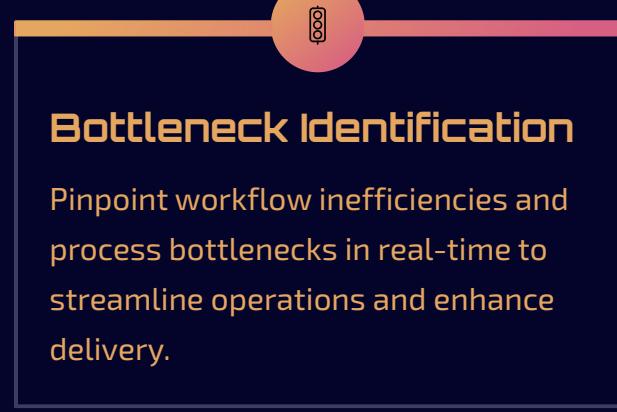
A safe, isolated environment for testing and iterating new integrations.

Accute's **developer-first approach** and robust API platform set it apart from competitors with limited integration capabilities. We are building the most extensible platform in the market.



# Advanced Analytics & Business Intelligence

Accute transforms raw data into strategic insights, empowering firms to make informed decisions. Beyond basic reporting, our AI-powered analytics suite provides a comprehensive view of operational efficiency, financial performance, and future opportunities.



While competitors offer basic historical reporting, Accute provides forward-looking, AI-driven strategic insights that empower firms to not just react, but proactively shape their future.



# Client Portal & Self-Service Automation

## Intelligent Document Upload

Automatic categorization of uploaded documents, ensuring efficient organization and retrieval.

## AI-Guided Questionnaires

Clients complete forms with AI assistance, reducing errors and speeding up data collection.

## Real-Time Status Updates

Provides clients with clear, natural language explanations of their service progress.

## Secure Messaging

Encrypted communication with AI-assisted responses for quick and accurate client interactions.

## Payment Processing

Integrated smart invoicing and secure payment gateways for hassle-free transactions.

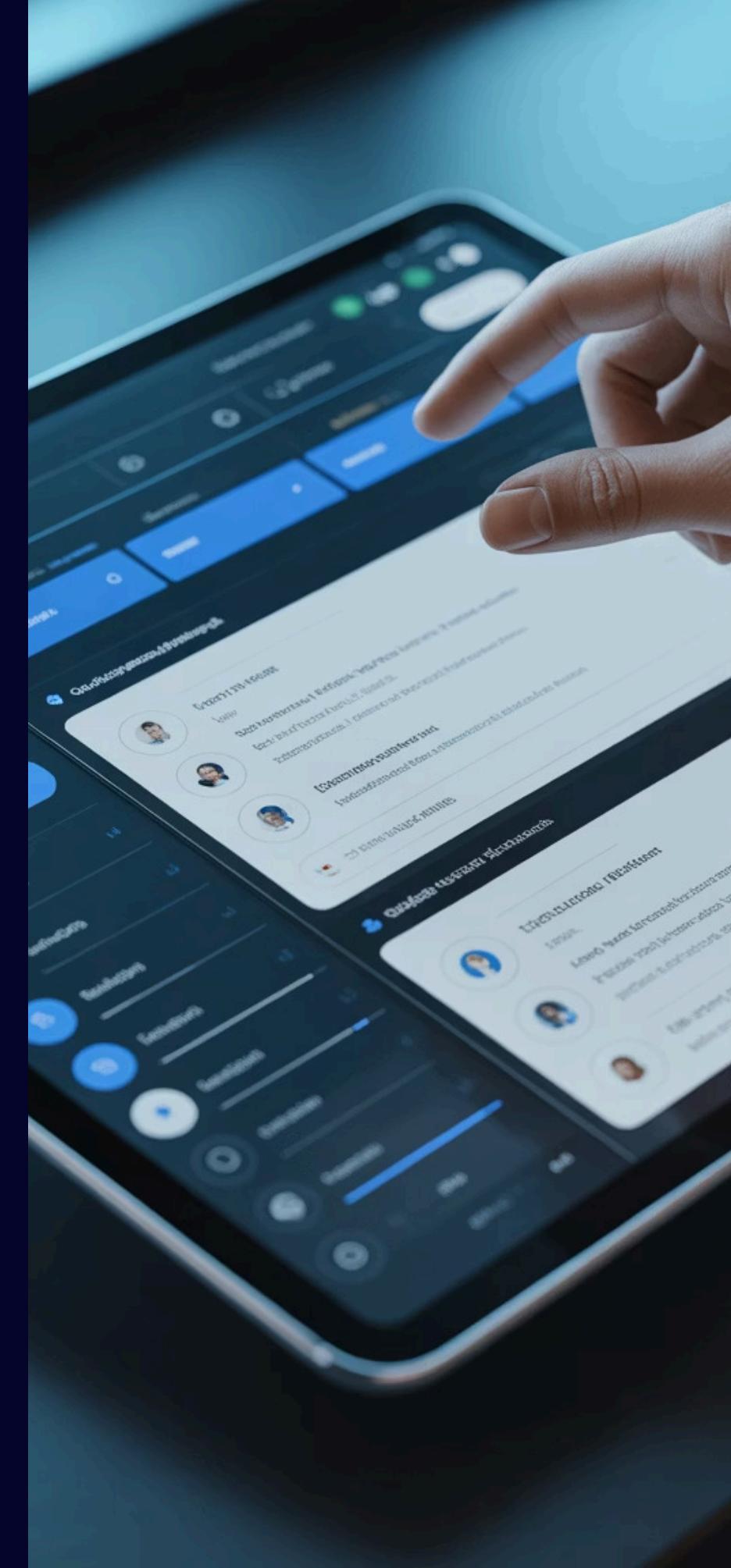
## Document Signing

Automated reminders for document signatures, ensuring timely completion of agreements.

## Mobile-Responsive Design

Seamless access and functionality across all devices for clients on the go.

While many competitors offer basic portals, Accute delivers a truly intelligent self-service experience, leveraging AI to streamline client interactions and enhance satisfaction.



# Luca - Conversational AI Assistant



## Natural Language Queries

Seamlessly query project management data using everyday language for quick insights and actions.



## Intelligent Data Search

Access and intelligently search across all firm data, pulling relevant information from various sources instantly.



## Task Management

Create and assign tasks, set deadlines, and manage project workflows directly through conversational commands.



## Status Updates & Reporting

Receive real-time project status updates and generate comprehensive reports via chat interface.



## Client Info Retrieval

Quickly retrieve detailed client information, communication history, and service records on demand.



## Unified Agent Integration

Acts as a central hub, integrating with all other Accute agents for a truly unified and intuitive experience.



## Firm-Specific Learning

Continuously learns and adapts to your firm's unique terminology, processes, and client base for enhanced relevance.

Luca delivers a ChatGPT-like experience tailored specifically for accounting firms. It provides an unparalleled level of intuitive interaction and operational efficiency, far exceeding anything competitors currently offer in AI-driven workflow automation.



# Scribe - Document Generation Agent

Accute's Scribe agent revolutionizes document drafting, moving beyond static templates to intelligent, dynamic content generation. Scribe ensures accuracy, compliance, and personalization across all your essential firm documents.

- **Engagement Letter Generation**

Crafts engagement letters complete with jurisdiction-specific clauses and service details, ensuring legal and regulatory compliance.

- **Tax Memo Drafting**

Generates comprehensive tax memos, automatically incorporating relevant research citations and latest tax code updates.

- **Client Advisory Letters**

Produces personalized advisory letters with recommendations tailored to individual client profiles and needs.

- **Proposal and Quote Generation**

Automates the creation of professional proposals and quotes, reflecting service scopes and pricing structures.

- **Compliance Documentation**

Assists in drafting essential compliance documents, reducing manual effort and minimizing risk.

- **Professional Formatting & Branding**

Applies consistent professional formatting and branding across all documents, maintaining your firm's identity.

- **Version Control & Workflows**

Integrates seamlessly with version control and approval workflows for collaborative review and secure document finalization.

While many competitors offer basic template libraries, Accute's Scribe distinguishes itself with true intelligent generation. Instead of just filling in blanks, Scribe understands context, integrates data, and dynamically constructs documents, providing a level of sophistication and efficiency unmatched in the market.



# Echo: Precision Data Validation & Quality

Accute's Echo agent is engineered to ensure unparalleled data accuracy and integrity, preventing costly errors before they impact your operations. It performs a comprehensive suite of validation checks:

## Cross-Document Validation

Ensures consistency and accuracy by cross-referencing information across multiple related documents.

## Data Consistency Checks

Verifies logical coherence and agreement between interconnected data points within your system.

## Financial Anomaly Detection

Identifies unusual patterns or deviations in financial data that could indicate fraud or errors.

## Compliance Rule Validation

Automatically checks data against current tax regulations and other critical compliance standards.

## Real-time Error Flagging

Provides instant alerts for errors with intelligent, suggested corrections to streamline remediation.

## Historical Trend Analysis

Compares current data against historical records to identify trends, discrepancies, and potential issues.

## Seamless Parity Integration

Works directly with our Parity agent to validate data extracted from documents, ensuring end-to-end accuracy.

This advanced validation framework is a critical differentiator. Echo proactively prevents errors that traditionally cost firms significant time and money, a capability unmatched by competitors who lack this deep, AI-native validation.



# Relay - Communication Intelligence Agent

Relay transforms client communication for modern accounting firms, moving beyond basic email functions to deliver context-aware, AI-powered interactions that enhance client relationships and streamline operations.

## Context-Aware Drafting

AI drafts emails considering client history, previous interactions, and current project status for relevant and personalized messages.

## Sentiment Analysis

Monitors tone and emotion in client communications, flagging critical messages and suggesting appropriate responses for better client management.

## Automated Follow-ups

Configures smart, timed follow-up sequences to ensure no communication falls through the cracks, maintaining engagement without manual effort.

## Email Categorization

Automatically sorts incoming emails, prioritizes urgent matters, and routes them to the correct team members or AI agents.

## AI-Personalized Templates

Utilizes a rich template library, enhanced by AI to personalize content based on specific client and situation details.

## Multi-Language Support

Communicates seamlessly with global clients in their native languages, removing communication barriers and expanding reach.

## Client Portal Integration

Ensures a unified communication experience by integrating directly with the client portal, centralizing all interactions.



## Beyond Basic Email: Accute's Edge

### Accute Relay

- Proactive, intelligent automation
- Contextual understanding & personalization
- Real-time sentiment insights
- Seamless integration with workflows
- Multi-language, global client support
- Reduces manual effort by 70%+

### Competitor Solutions

- Reactive, manual tasks
- Generic templates, limited context
- No sentiment analysis
- Disconnected from core operations
- Primarily single-language support
- Minimal efficiency gains

# Cadence - AI Workflow Automation

Cadence is Accute's Workflow Specialist agent, meticulously designed to redefine how accounting firms manage their operational processes. By integrating cutting-edge AI, Cadence automates workflow creation, assignment, and execution, ensuring unparalleled efficiency and precision from start to finish.

## AI-Powered Workflow Creation

Generate sophisticated workflows on demand using intuitive natural language descriptions, entirely bypassing tedious manual configuration.

## Intelligent Task Assignment

Tasks are automatically routed to the most suitable team members, optimizing distribution based on their real-time capacity, specialized expertise, and current workload.

## Dynamic Deadline Management

Cadence proactively calculates and adjusts deadlines, intelligently accounting for task dependencies and potential bottlenecks to maintain project momentum.

## Automated Exception Handling

Predefined rules and escalation paths for workflow exceptions minimize manual intervention, ensuring prompt and efficient resolution of issues.

## Predictive Progress Tracking

Monitor workflow progress with real-time insights and predictive completion dates, allowing for proactive adjustments and stakeholder communication.

## Seamless Agent Integration

Cadence orchestrates with all other Accute agents, enabling a truly end-to-end automated process that eliminates data silos and manual handoffs.

## Comprehensive Template Library

Access a rich library of pre-built workflows for common accounting cycles, including tax season, audits, and bookkeeping, accelerating deployment.

## Competitive Edge in Workflow Automation

Feature	Accute (Cadence)	Competitors (TaxDome, Karbon)
Workflow Setup	✓ AI-powered, natural language automation	□ Manual setup required
Task Assignment	✓ Intelligent, capacity-based	□ Manual, rule-based
Deadline Management	✓ Dynamic, dependency-aware	□ Static, manually updated
Exception Handling	✓ Automated escalation rules	□ Manual identification & resolution

# Parity - Document Intelligence Agent

## 1 OCR and Intelligent Data Extraction

Accurately extracts data from tax forms (1040, 1120, K-1, W-2, 1099), bank statements, invoices, and receipts, eliminating manual entry for critical financial documents.

## 2 Bank Statement Parsing & Reconciliation

Automates the process of parsing complex bank statements and assists in reconciliation, saving hours of tedious work.

## 3 Financial Statement Analysis

Intelligently processes and analyzes financial statements to provide key insights and ensure data consistency.

## 4 Multi-Format Support

Seamlessly handles various document types including PDFs, images, and scanned documents, ensuring comprehensive coverage.

## 5 Confidence Scoring & Human-in-the-Loop Validation

Provides confidence scores for extracted data and integrates human review for high-accuracy verification, ensuring reliability.

## 6 Continuous Learning & Improvement

Parity learns from every correction and validation, continuously enhancing its accuracy and intelligence over time.

Parity revolutionizes document processing by eliminating the manual data entry that still burdens many accounting and tax firms. This advanced AI agent ensures accuracy and efficiency, freeing up valuable time for more strategic tasks.



# Forma - AI Form Generation Agent

Forma revolutionizes how accounting and tax firms create and manage client intake forms, surveys, and questionnaires. Leveraging advanced AI, Forma eliminates tedious manual setup, enabling dynamic and intelligent form generation tailored to specific client needs and service offerings.



## Natural Language Form Creation

Simply describe the form you need in plain English, and Forma's AI instantly constructs a custom form, understanding context and intent.



## Intelligent Field Suggestions

Forma proactively suggests relevant fields and data points based on the client type, service requested, and industry best practices, ensuring comprehensive data capture.



## Multi-Step Form Wizards

Design complex, multi-page forms that guide clients through intricate processes with intuitive navigation, improving completion rates and user experience.



## Conditional Logic Automation

Automate form behavior with advanced conditional logic; fields and sections dynamically appear or disappear based on previous client responses, streamlining data collection.



## Pre-filled Templates & Data Integration

Utilize a rich library of pre-configured templates for common accounting scenarios, significantly reducing setup time. Forma also integrates seamlessly with Parity for automatic data extraction from submitted forms.



## Real-Time Validation Rules

Implement real-time validation to ensure data accuracy, completeness, and consistency as clients fill out the form, minimizing errors and rework.

## Automated vs. Manual: The Accute Advantage

### Accute: AI-Powered Automation

Accute's Forma agent automates the entire form creation process, from initial design to intelligent field population and validation. This drastically cuts down on administrative burden, accelerates client onboarding, and improves data quality.



### Competitors: Manual Form Building

Traditional competitors typically require users to manually drag-and-drop fields, configure logic, and update templates one by one. This process is time-consuming, prone to human error, and lacks the intelligent adaptation of AI.

