

ACCOUNTING & TAX

The Accounting & Tax **AI Audit**

18 diagnostic questions to identify exactly where your back office is bleeding hours per week on manual data entry and repetitive workflows.

Why This Audit Matters

Mid-market accounting and tax firms have CPAs wasting billable hours doing baseline data entry. This audit identifies where you can deploy agents to parse messy financial documents securely.

The 18-Point Diagnostic

Document Collection & Parsing

- 1. Does document collection consume the first 40% of every tax engagement?
- 2. Do CPAs manually type data from W-2s, K-1s, and 1099s into tax software?
- 3. Are clients submitting messy, unformatted shoe-box receipts or blurry photos?
- 4. Do staff manually chase clients for missing forms or signatures?
- 5. Is normalizing data from different financial institutions a major headache?
- 6. Do you spend hours converting bank statement PDFs into structured CSVs?

Reconciliation & Reporting

- 7. Is bank and credit card reconciliation a manual, line-by-line process?
- 8. Are month-end closes delayed by manual journal entry creation?
- 9. Do you manually categorize transactions based on historical patterns?
- 10. Is compiling consolidated financial statements a tedious spreadsheet task?
- 11. Are audits slowed down by manual sample selection and verification?
- 12. Do staff manually verify expense reports against corporate policies?

System & Data Sovereignty

- 13. Do GLBA or IRS Section 7216 regulations prevent you from using public AI?
- 14. Is client financial data too sensitive to risk sending to ChatGPT?
- 15. Does your accounting software (e.g., CCH, Thomson Reuters) lack custom API integrations?
- 16. Are internal SOPs poorly documented or siloed among senior partners?
- 17. Do you struggle to scale during busy season without hiring temporary staff?
- 18. Is the firm relying on outdated legacy systems that force manual workarounds?

Scoring Rubric

0-4

EXPLORING

Operations are lean. Monitor AI for future gains.

5-9

READY

Clear bottlenecks exist. ROI will be immediate.

10-14

URGENT

Manual tasks actively prevent scaling.

15-18

BLEEDING

Severe operational tax. Over-paying for labor.

What We Build

Sovereign Architecture

Agents deployed in your AWS/GCP. Parse W-2s, K-1s, receipts, and bank PDFs into reconciled ledgers entirely on-premise.

Multi-Channel Triaging

Auto-categorize transactions and draft tax prep for your CPAs to approve, ensuring financial data sovereignty.

Predictable Flat Fees

No per-token metering or hidden API taxes. We charge a flat monthly subscription tied to capacity.

Your IP Stays Yours

Unlike ChatGPT, our models are isolated. You own the workflow, the system, and your private data remains completely sequestered.

Armen Donigian

Founder, Performance AI Lab | Former Meta SuperIntelligence Lab

With 25 years in software engineering and enterprise infrastructure, I build systems that prioritize security, scale, and measurable ROI.