

# TaxAssistIQ

The AI does the work.  
You govern it.





- Clients sending the same document three times, but never the one you need.



- Hours wasted on manual data entry that adds zero professional value.



- Software that demands you navigate dozens of screens to find what matters.



- Technology has grown more complex, but the work hasn't gotten easier.



# A fundamentally different relationship with your work



## The Operator Model (Yesterday)

---

- **Manual Assembly:** You extract data and populate forms. `1E293B` `FAFAF9`
- **Continuous Navigation:** You search through dashboards to find the work.
- **System Serves the Software:** You translate tax logic into software inputs.



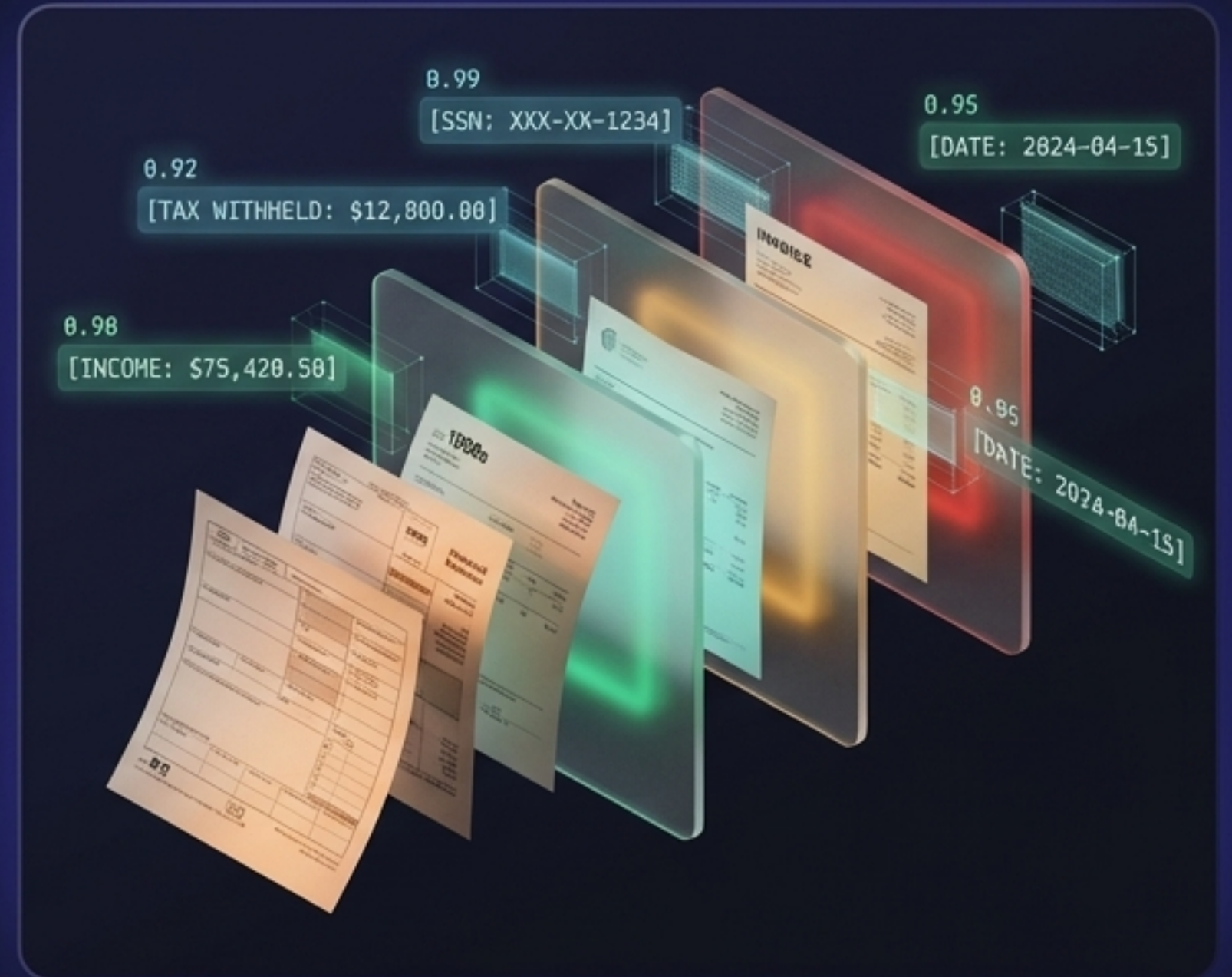
## The Orchestrator Model (Today)

---

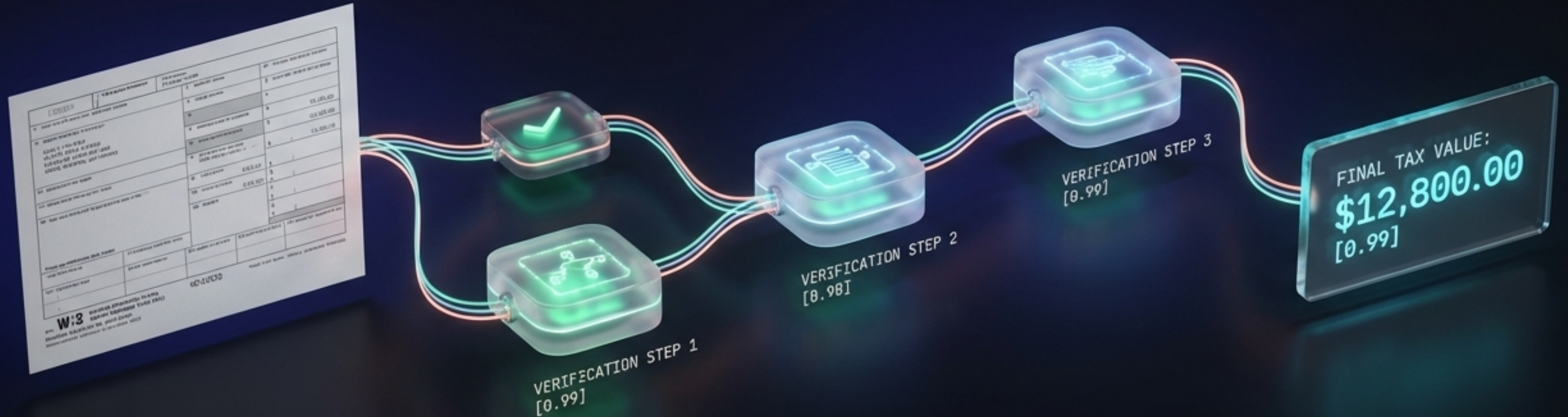
- **Intelligent Intake:** The system extracts, organizes, and verifies. `1E293B` `FAFAF9`
- **Prioritized Stream:** The system presents exceptions demanding your judgment.
- **System Serves the Intent:** You set policy; the system executes the logic.

# Intelligent intake that structures the chaos

- Reads over 40 document types instantly with exceptional precision.
- Cross-references data against prior years to identify missing items.
- Explains missing data to clients in plain language, tracking its arrival.
- Achieves complete ingestion in one pass, eliminating frustrating email chains.



# Verified reasoning, never narrated assumptions



Every single value traces directly back to a source document.

Every recommendation features a clear, clickable reasoning chain.

Confidence scores are strictly earned through verification, never asserted.

Source-cited, auditable paths ensure you never trust a black box.

# Your morning stream, driven by confidence

- A prioritized flow of items needing attention, not a dashboard of counts.
- High-confidence items compress to one line for rapid confirmation.
- Items requiring your judgment expand fully with source documents attached.
- As items resolve, the interface physically calms and clears.



# Four actions. That is all you need.

✓ Confirm

🔍 Inquire

✎ Adjust

👤 Delegate

**Confirm**

Accept the system's verified work with a single click.

**Inquire**

View the complete reasoning chain and original source documents.

**Adjust**

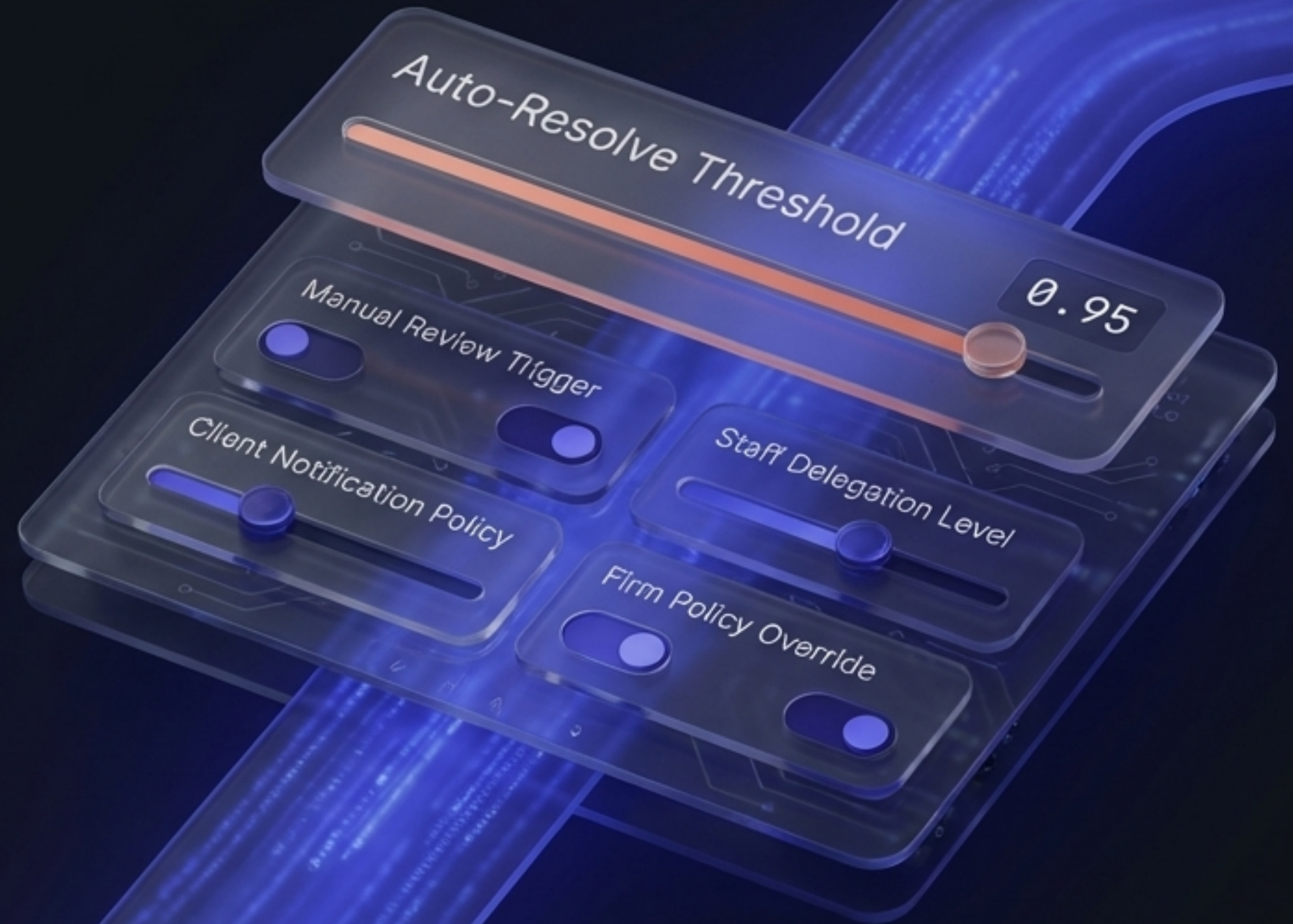
Correct a specific value or override a system recommendation.

**Delegate**

Route to a team member or client with full context attached.

# Absolute firm-level governance

- Set strict confidence thresholds for auto-resolve versus manual review.
- Define exact client communication policies and follow-up cadences.
- Assign staff to specific return types or delegated autonomy levels.
- The system operates entirely within your boundaries. Your firm. Your rules.

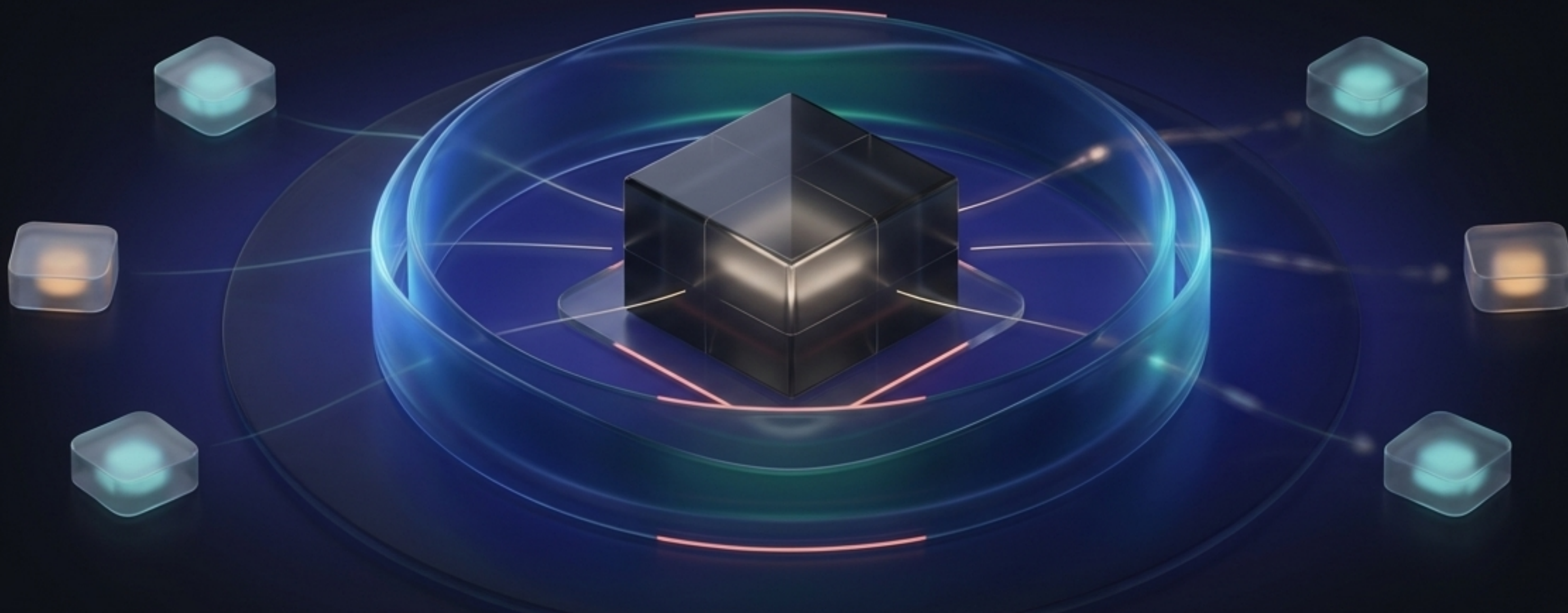


# What your clients actually experience



- A secure portal carrying your firm's name, logo, and colors.
- Clients upload documents effortlessly via drag, drop, or smartphone photo.
- Instant receipt confirmation and missing items requested in plain language.
- Your firm looks modern, competent, and highly organized.

# An impenetrable data security architecture



Single-tenant infrastructure ensures data never commingles in a shared cloud.

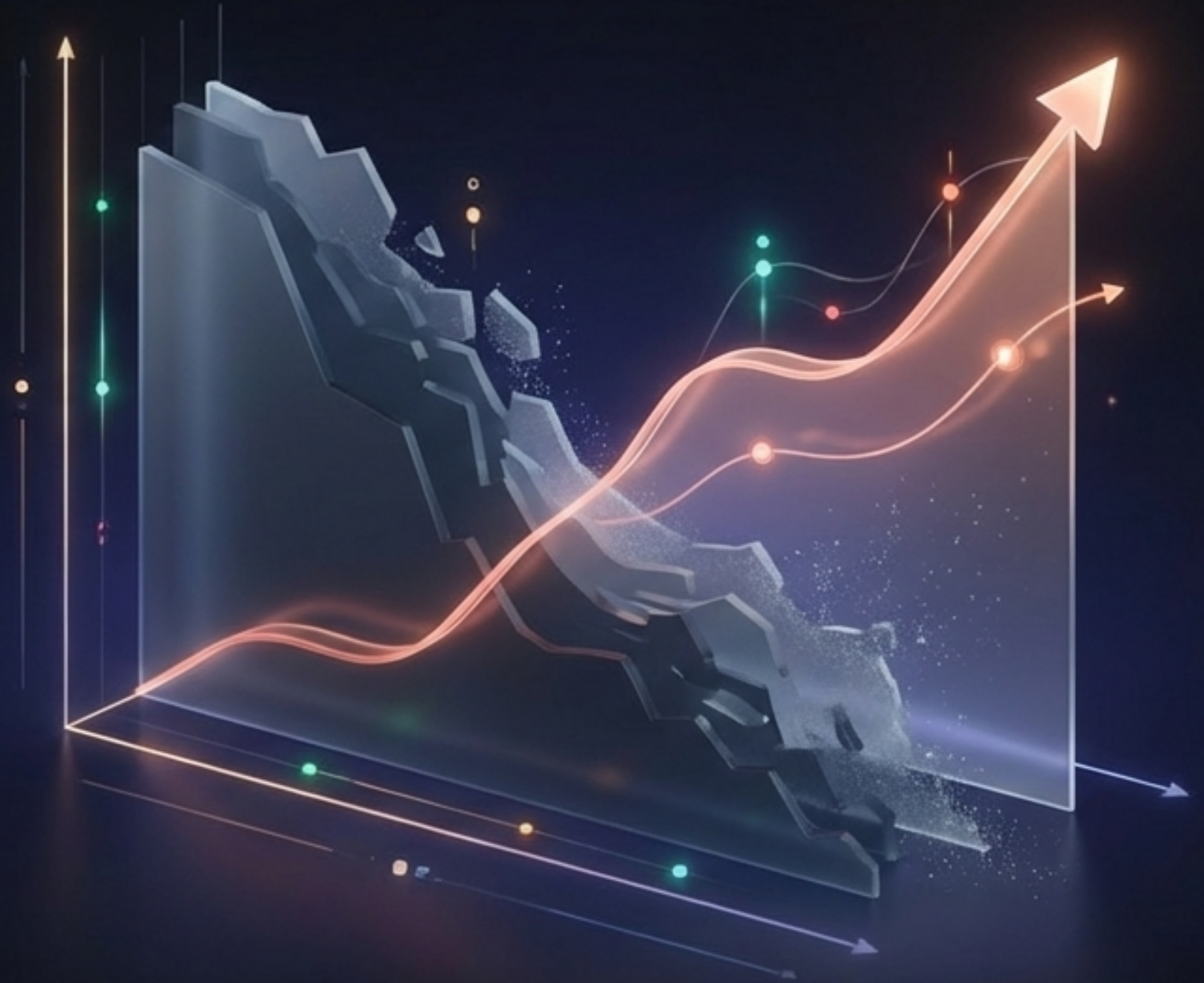
Client data never leaves your infrastructure unredacted.

AI reasoning operates solely on anonymized data with all PII stripped.

You maintain complete data ownership with every action logged and auditable.

# The economics of Resolution-as-a-Service

- Return your hours entirely to high-value professional judgment.
- Handle more returns with the same team by eliminating assembly work.
- You only pay when the system delivers a return ready for your review.
- No per-seat software fees. You pay for actual outcomes, not access.





# The AI does the work. You govern it.

- This is not about replacing tax professionals.
- It removes everything that isn't professional work from your day.
- Your expertise, your judgment, and your client relationships remain paramount.
- Your practice is amplified by an intelligent system you direct and govern.

# TaxAssistIQ

[taxassistiq.com](http://taxassistiq.com)  
Request a demo.