

AI EMPLOYEES FOR CPA AND ACCOUNTING FIRMS

Take the busywork off your staff

Tax season is the wrong time for your people to be chasing W-2s, resending engagement letters and digging through the shared inbox. **AI employees take that work off their plate.** They prepare the follow-ups and first drafts, and a named person on your team approves anything that goes out.

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- They handle real office work, not just chat.
- Setup takes about a week.

✓ **AI employees do the work, and your team approves anything that goes out.**

WHERE YOUR STAFF'S TIME GOES

Six jobs AI employees can take off your staff

These are repetitive jobs that follow a process, the kind that pile up from January to April.



Missing tax documents and organizers

AI employees track which clients still owe W-2s, 1099s and organizers and draft the next reminder when one is due, so your staff does not have to keep that list by hand.



Unsigned engagement letters

They watch for engagement letters that haven't come back signed and draft the follow-ups, so work can start on time.



Shared inbox and routine replies

They sort the shared inbox by client and topic, flag what's urgent, and draft replies to routine questions like "Did you get my documents?"



Appointment and staff reminders

They draft appointment reminders for clients and schedule reminders for staff, so your front desk isn't making those calls by hand.



Seasonal hire screening

They sort seasonal applications against the requirements you set, summarize each candidate, and draft interview scheduling emails.



Vendor and supply follow-ups

They follow up on open vendor requests, supply orders and renewals, so small things don't get buried when the office is busiest.

What your firm gets



Time back in tax season

Your staff spends the busy months on returns and clients instead of reminders and inbox sorting.



Time and money saved

Your team gets more done without adding headcount just to keep up with follow-ups and scheduling.



Follow-ups go out on time

Follow-ups are drafted on schedule every time, so fewer documents and signatures slip through the cracks.



Your people make the calls

AI employees handle the first pass, and your staff reviews the work and keeps every decision.

HOW IT WORKS

Working in about a week

We start with the jobs that eat the most staff time and build from there.

- 1 Pick the jobs**
We sit down with your team, choose the jobs to hand off first, and name who approves what.
- 2 Your firm's AI account**
Your firm opens the AI account in its own name and invites us in as an admin.
- 3 Policy and data rules**
Before go-live, we set up your AI use policy and data rules, including which client information stays out.
- 4 Build and go live**
We connect your AI employees to your email, calendar and tools, write a playbook for each job, and train your approvers.
- 5 Weekly tuning**
We review the work every week, fix what's off, and keep an eye on spending.



You stay in control

- ✓ A named person approves anything that goes out, gets paid, or gets deleted. That rule is written into our agreement.
- ✓ A spending cap is set before go-live and changes only with your approval.
- ✓ Your firm owns the AI account, so your AI employees and their work stay with you if we part ways.
- ✓ Either side can end the service with 30 days' notice.



Your WISP and the IT underneath

Under the FTC Safeguards Rule, tax preparers must keep a written information security plan. AI employees can work in the same accounts and files as your staff, so the IT underneath matters. We help put technical safeguards in place, including multi-factor sign-in, encryption, backups and access controls, and keep them maintained alongside your compliance advisor.

What it costs

FOR CAMBIUM MANAGED IT CLIENTS

Three AI employees

\$1,500 **\$695**
one-time setup per month

- ✓ We review the work and tune playbooks weekly.
- ✓ We fix connections and logins when they break.
- ✓ We monitor spending against your cap.
- ✓ A Cambium specialist steps in if your AI employees get stuck.
- ✓ You can reassign one of the three roles each quarter.

Your firm pays the AI provider directly for its platform subscription. The plan is month to month.

FIXED PRICE

AI use policy, regulated tier

\$1,195 **\$995**
fixed price for managed IT clients

- ✓ We write a plain-English AI use policy that spells out which AI tools your team can use and what client information stays out.
- ✓ Your staff gets a one-page summary of the policy.
- ✓ Each employee signs a staff acknowledgment form.

This tier is built for offices that handle regulated client data, like tax returns. A policy is not legal advice, so have your attorney review it.

See it working before you decide

We use AI employees in our own office to get more done in less time, so the demo shows real work with private details hidden. Bring the jobs you have in mind, and we'll tell you which ones are a good fit.

Book a quick 15-minute demo with one of our AI specialists

Get a free technology and AI review

You can also call **(402) 514-3200**.