



## AI for Accountants

*Use modern AI without exposing client financials.*

Built for CPAs, accountants, and tax professionals who handle sensitive client data every day.

### The Problem

Accountants handle some of the most sensitive information in business: tax returns, financial statements, payroll data, Social Security numbers, bank accounts. Your clients trust you to protect this information absolutely.

When you use public AI tools like ChatGPT, **you lose control of your data**. Whatever you type travels through servers you don't control, and you can't guarantee where it ends up. For accountants bound by professional ethics and IRS regulations, that creates real risk.

### The Solution

**TPAI Pro** gives you modern AI assistance in a private environment. You connect through a secure private link, and the environment cannot send data to the public internet. Your client information stays protected.

**Setup takes minutes.** You connect through a secure app we provide, and you're in. Same familiar chat interface: type, paste, upload files. No new workflow to learn.

### Use Cases for Accountants

| Task                      | How AI Helps                                                                                                            |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------|
| <b>Tax Research</b>       | Explore tax code questions, identify deductions, research treatment of complex transactions.                            |
| <b>Client Letters</b>     | Draft engagement letters, organizer cover letters, tax planning recommendations, and year end summaries.                |
| <b>Financial Analysis</b> | Analyze financial statements, identify trends, explain variances, prepare management discussion.                        |
| <b>Client Organizers</b>  | Turn a client's messy emails and attachments into a clean organizer summary with follow up questions. Tame the shoebox. |
| <b>IRS Correspondence</b> | Draft responses to IRS notices, penalty abatement requests, and audit documentation.                                    |

### Why It Matters

- **Client confidentiality.** Tax returns and financial data are deeply personal. Your clients expect absolute discretion.

- **Professional standards.** Professional standards and IRS practice rules expect you to protect client information. This includes how you use technology.
- **Regulatory risk.** Unauthorized disclosure of taxpayer information can result in penalties and loss of practice rights.

## Professional Standards

AI assists with drafting and research, but you remain responsible for all work product. Always review and verify outputs, especially tax positions and calculations. AI can make errors. Not for final tax positions, filing decisions, or computations without verification. You are the accountant of record.

## Security Quick Facts

|                      |                                                                                                        |
|----------------------|--------------------------------------------------------------------------------------------------------|
| <b>Access</b>        | Secure connection app with certificate we issue. This is the only way to access the system.            |
| <b>Network</b>       | The TPAI environment has no public internet egress. Your data stays inside the private environment.    |
| <b>AI Models</b>     | AI model access occurs via private AWS connections, not public internet.                               |
| <b>Encryption</b>    | Per user encryption. Each user's content is encrypted separately, so no one else can access your data. |
| <b>Admin Access</b>  | TPAI does not access your content by default. Any access requires your approval and is logged.         |
| <b>Data Location</b> | Currently US. EU region planned for Q2 2026. Let us know if you want early access when it goes live.   |

## Pricing

**TPAI Pro: \$299/month per user.** Includes secure access, per user encryption, and onboarding support.

*ROI:* If it saves you 30 minutes a day during busy season, it pays for itself many times over. Less time drafting, more time advising clients.

## Next Steps

**Reserve your beta seat.** We're opening a limited beta now. \$99 refundable deposit holds your spot and gets credited toward your first month.

**Reserve now at** <https://totallyprivate.ai/beta>

**Want to learn more first?**

- Watch the 3 minute demo: <https://totallyprivate.ai/videos/intro.mp4>
- Book a 15 minute call: [calendly.com/rcastillo-totally-private](https://calendly.com/rcastillo-totally-private)
- Email me directly: [rcastillo@totallyprivate.ai](mailto:rcastillo@totallyprivate.ai)