



# AccoAI

**The ultimate AI-Powered Workspace for accounting firms**

Founded by Lance Fuchia & Alex Loughry | [accoai.com](https://accoai.com)





# Problem: Accounting is Outdated



10+ hours wasted weekly on **repetitive tasks**



**Disorganized workflow** across 6+ softwares (Excel, Calendar, Slack, etc.)



**Messy spreadsheets** for employee and client tracking



Effort spent **chasing down clients**





**~7 Hours of Actual Work,  
~3 Hours of Busy Tasks**

**Average days for accountants during tax season.**





# A Typical Workflow:

The image displays a typical workflow involving three overlapping windows:

- Gmail:** Shows an inbox with 7 emails. The selected email is from Tim Smith, dated Nov 7, with the subject "Thank you for choosing Hilton. You...".
- Excel:** Shows a spreadsheet titled "Customer Tracking" with columns for Customer Name, Product, Order Date, and various follow-up dates. The data includes customers like Carly Reeves, Mary Mary, and Everett Reeves, with products such as BB Cream, Bonbon, and Face Primer.
- Task Management:** Shows a list of tasks with due dates and priorities. The selected task is "Thank you for choosing Hilton. You..." with a due date of Nov 7.

Cluttered...

Tedious...

Messy...

Eyesore...

# Introducing AccoAI

An AI-powered workspace for  
accounting firms

The screenshot displays the AccoAI interface for a client profile. The main header shows 'Clients list' with a back arrow. The client profile for 'Interior Design • Baker Consulting' is shown, including a profile picture, name, and details like 'Joined 6/20 • Worth ~\$10,000\*'. Below this, there are tabs for 'Personal' and 'Business'. A list of contact information is provided, including email, phone, LinkedIn, and social media handles. At the bottom, there are buttons for 'Add To List', 'Schedule Meeting', and 'Draft Email'. The right sidebar contains a 'Pinned Documents & Files' section with a document titled 'Engagement Letter' and a 'Latest Activity' section showing AI Assistant actions.

Clients list

Overview Activity Scheduling Docu

**Pinned Documents & Files +**

View ↓

**Engagement Letter**  
Submitted on 6/20, 2:30 pm

Services: Financial analysis Forecast

Assigned Team Members: +

50h total time spent

5h avg weekly time spent

\$2500 total paid

\$1600 avg monthly income

\$150 hourly rate

\$0 pending payments

12w together

Add data

Add To List Schedule Meeting Draft Email

Lead Talking Signed Working Lost

Partner Business Personal Other

**Latest Activity** ↗

- AI Assistant update info
- AI Assistant engagement letter signed
- AI Assistant sent engagement letter



# Everything in One AI-Powered Workspace

01

**Powerful Suite of  
AI Tools**

02

**Centralized Firm  
Workflow**

03

**Client and Employee  
Tracking**

04

**Automated Email  
Management**

# AI Automation and Tools



Instant task completion and data search with Atlas Chat



24/7 database and workflow updates



Automated client follow ups

**You**  
Whos my highest paying client?

**Atlas**  
Your highest paying client is Amazon. They have an ongoing Payroll and Tax return service as of now.

**You**  
Create new task, high priority, due tomorrow 3pm, "Finish Bookkeeping"


**Atlas**

Finish Bookkeeping 6 Mar, 10 am

Approve Deny

**You**  
Change Google description to: They're considering leaving

**Atlas**

 Google

Change 'Description' → They're considering leaving

Approve Deny

Email Alex to send monthly meeting notes

# Firm-Wide Collaboration and Insights



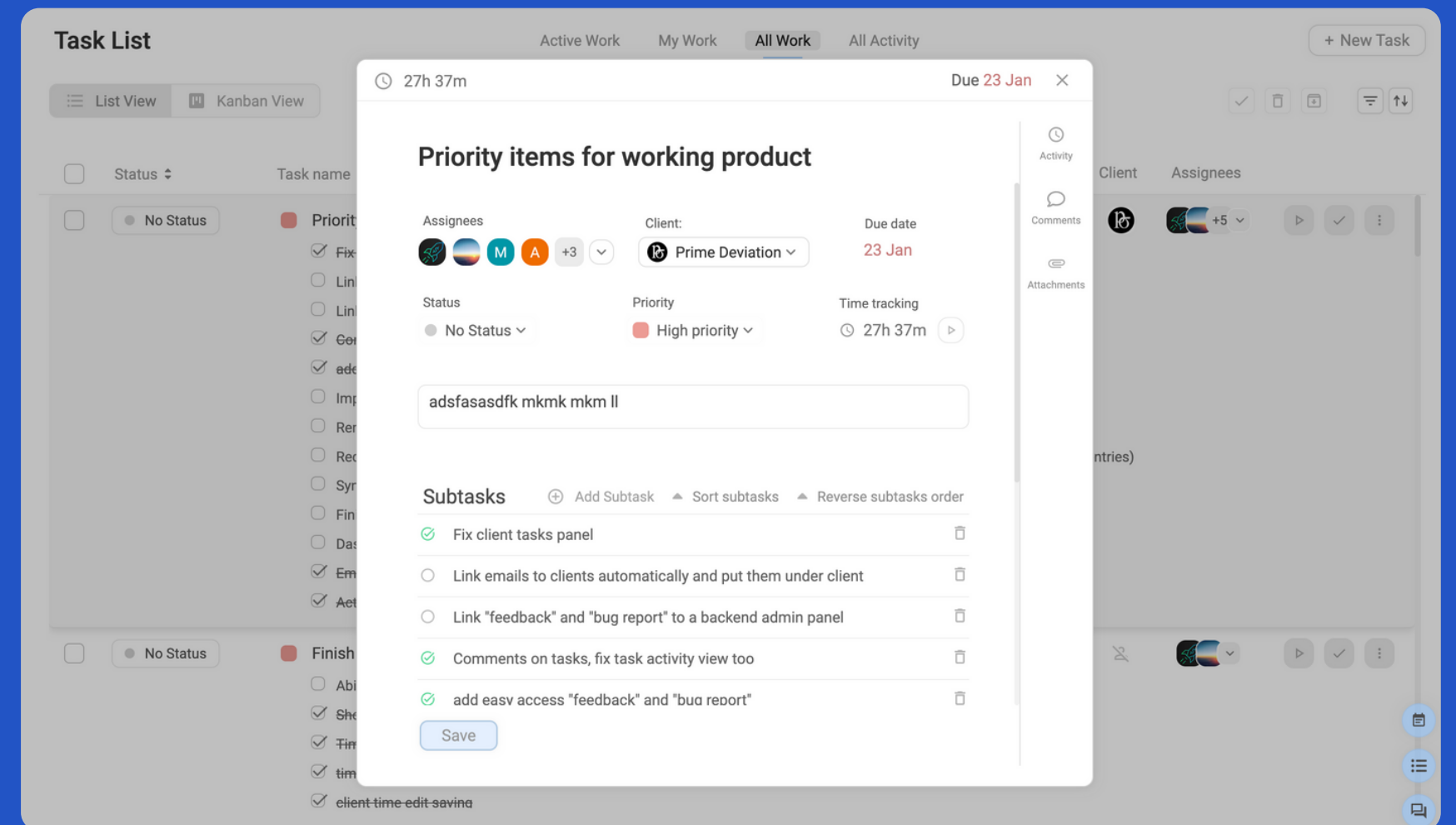
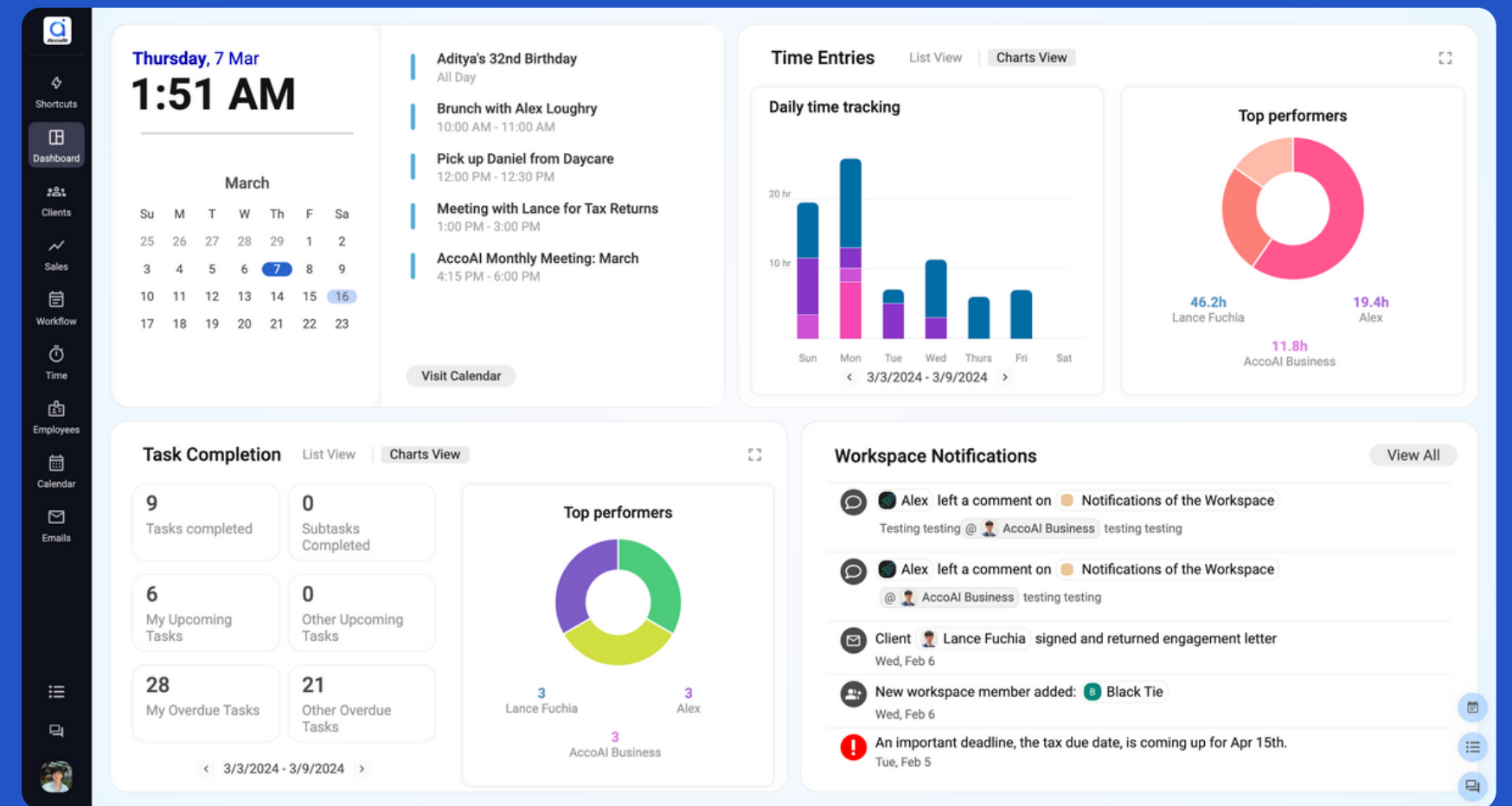
Workflow distribution among employees



AI productivity insights



Google Calendar and Outlook integration

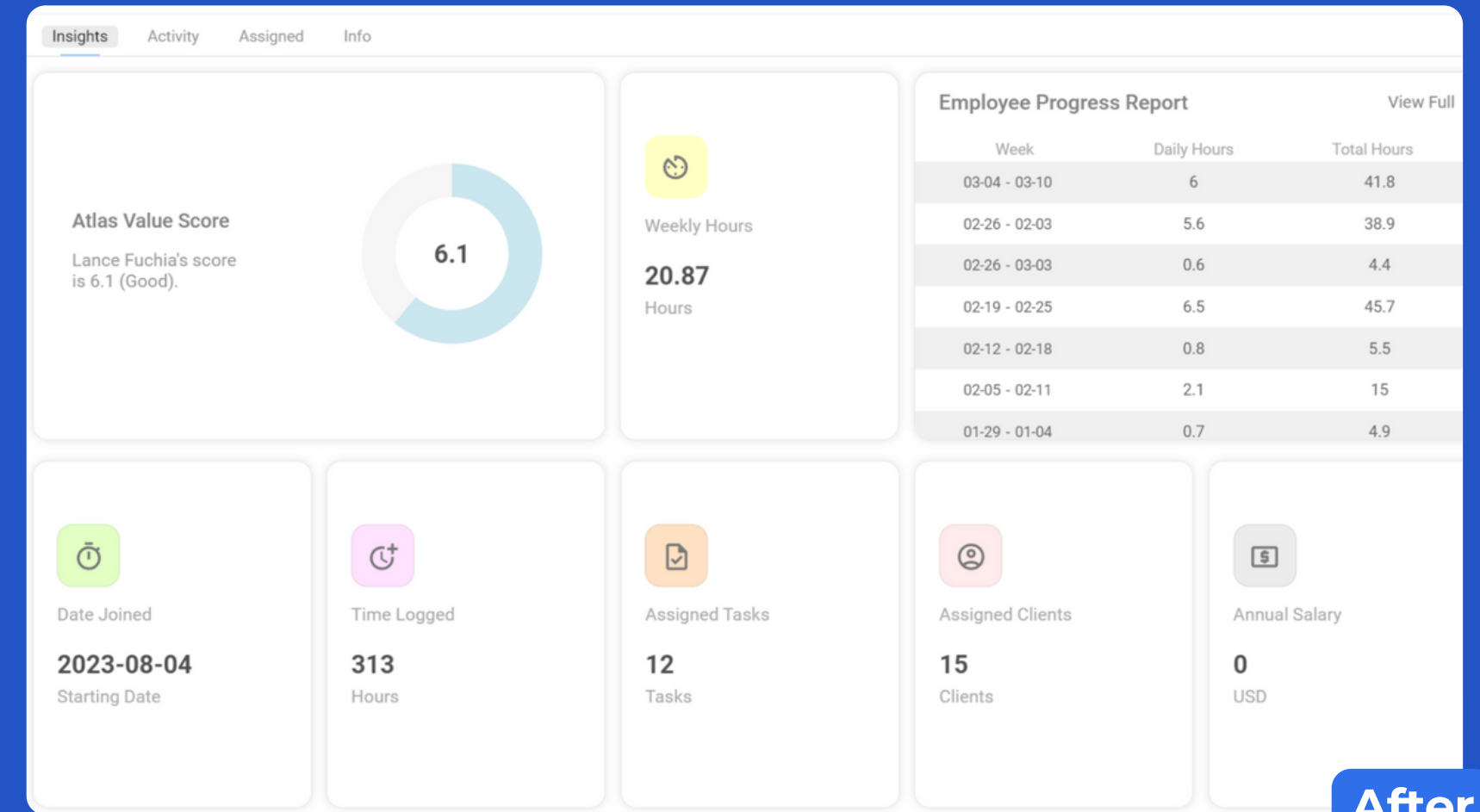




# Client and Employee Profiles

Employee ID	Name	Hiring Date	Hiring Source	Office	Department	Job Status
M-0001	Jemima Begum	Hiring Date	In-House	Main Office	Operations	Full Time
M-0002	Mercedes Banks	Employee ID	Reference	Main Office	Accounting	Full Time
M-0003	Macaulay Peck	Name	Reference	Main Office	Marketing	Full Time
M-0004	Hannah Shaw	Hiring Source	Website	Main Office	Sales	Full Time
N-0005	Carmel Beltran	Office	Website	North Office	Sales	Full Time
N-0006	Sarah-Jayne Morrison	Department	In-House	North Office	Sales	Full Time
E-0007	Alyce Milner	Job Status	Website	East Office	Sales	Part Time
E-0008	Aviana Kenny	Job Title	In-House	East Office	Operations	Full Time
M-0009	Harris Montes	ID / Passport	In-House	Main Office	Finance	Home Office
M-00010	Doris Power	Social Security #	Website	Main Office	HR	Full Time
N-00011	Isobelle Hurley	Gender	LinkedIn	North Office	Purchase	Full Time
N-00012	Donell Merrill	Education	LinkedIn	North Office	Sales	Part Time
N-00013	Jane Best	Date of Birth	LinkedIn	North Office	Sales	Part Time
E-00014	Kristofer Dyer	Nationality	Website	East Office	Accounting	Full Time
N-00015	Dominykas Xiong	Marital Status	In-House	North Office	Accounting	Full Time
		# of Kids				
		Driving License				
		Email				

Before



After



Auto-updated by Atlas AI



Real-time activity and stored data

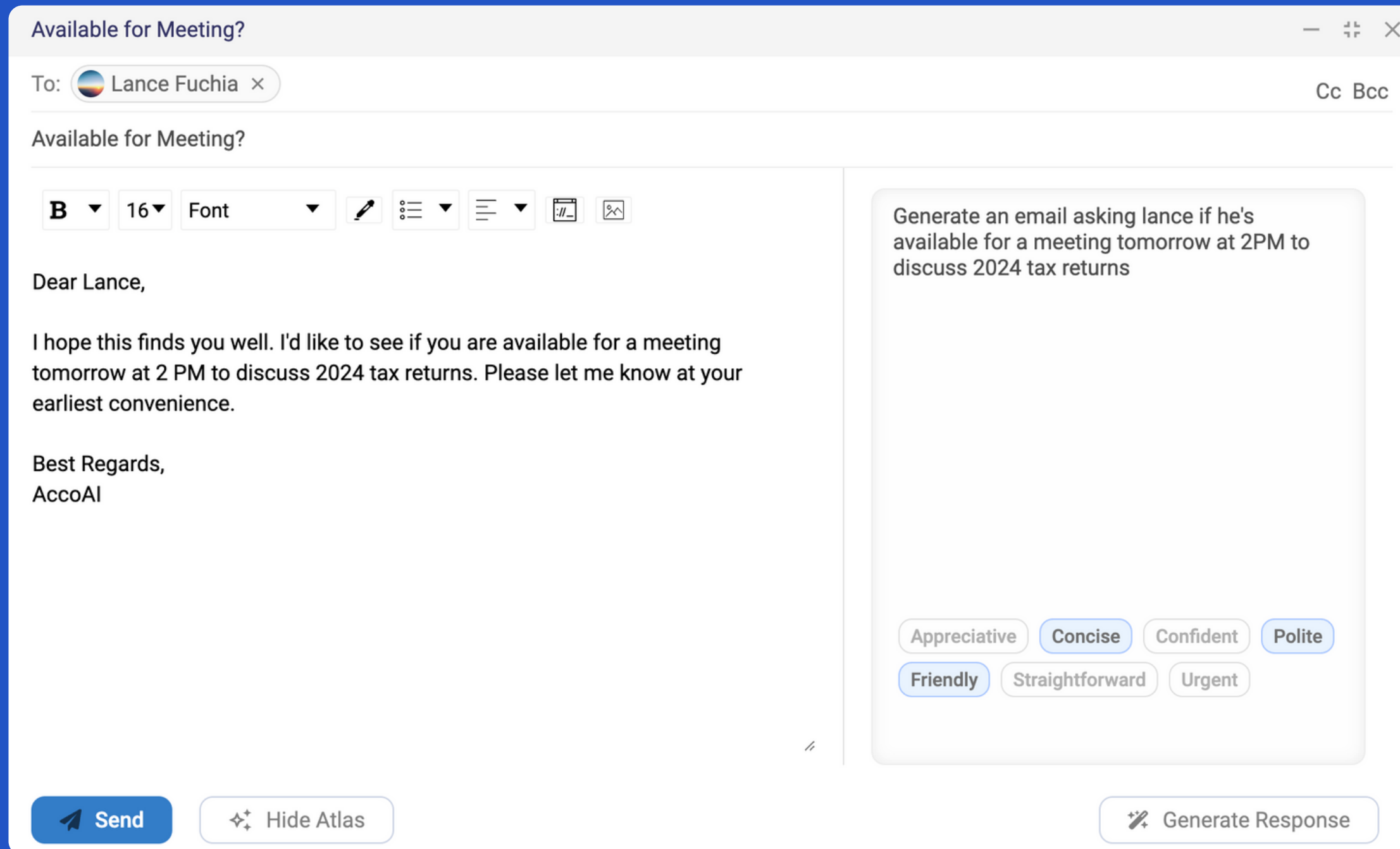


Accounting focused attributes



Instant import from Sheets/Excel

# AI-Composed Emails



The screenshot shows an email composition window titled "Available for Meeting?". The recipient is "Lance Fuchia". The email body contains the following text:

Dear Lance,

I hope this finds you well. I'd like to see if you are available for a meeting tomorrow at 2 PM to discuss 2024 tax returns. Please let me know at your earliest convenience.

Best Regards,  
AccoAI

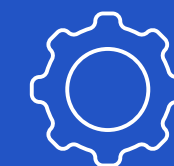
On the right side of the window, there is a text box with the prompt: "Generate an email asking lance if he's available for a meeting tomorrow at 2PM to discuss 2024 tax returns". Below the prompt are several style selection buttons: Appreciative, Concise, Confident, Polite, Friendly, Straightforward, and Urgent. At the bottom of the window, there are buttons for "Send", "Hide Atlas", and "Generate Response".



Instant generation from prompt and style



Auto-generated tasks, events, and data



Trained in accounting and tax compliance



# Market Size

**\$5.96 Billion**

TAM

**\$4.77 Billion**

SAM

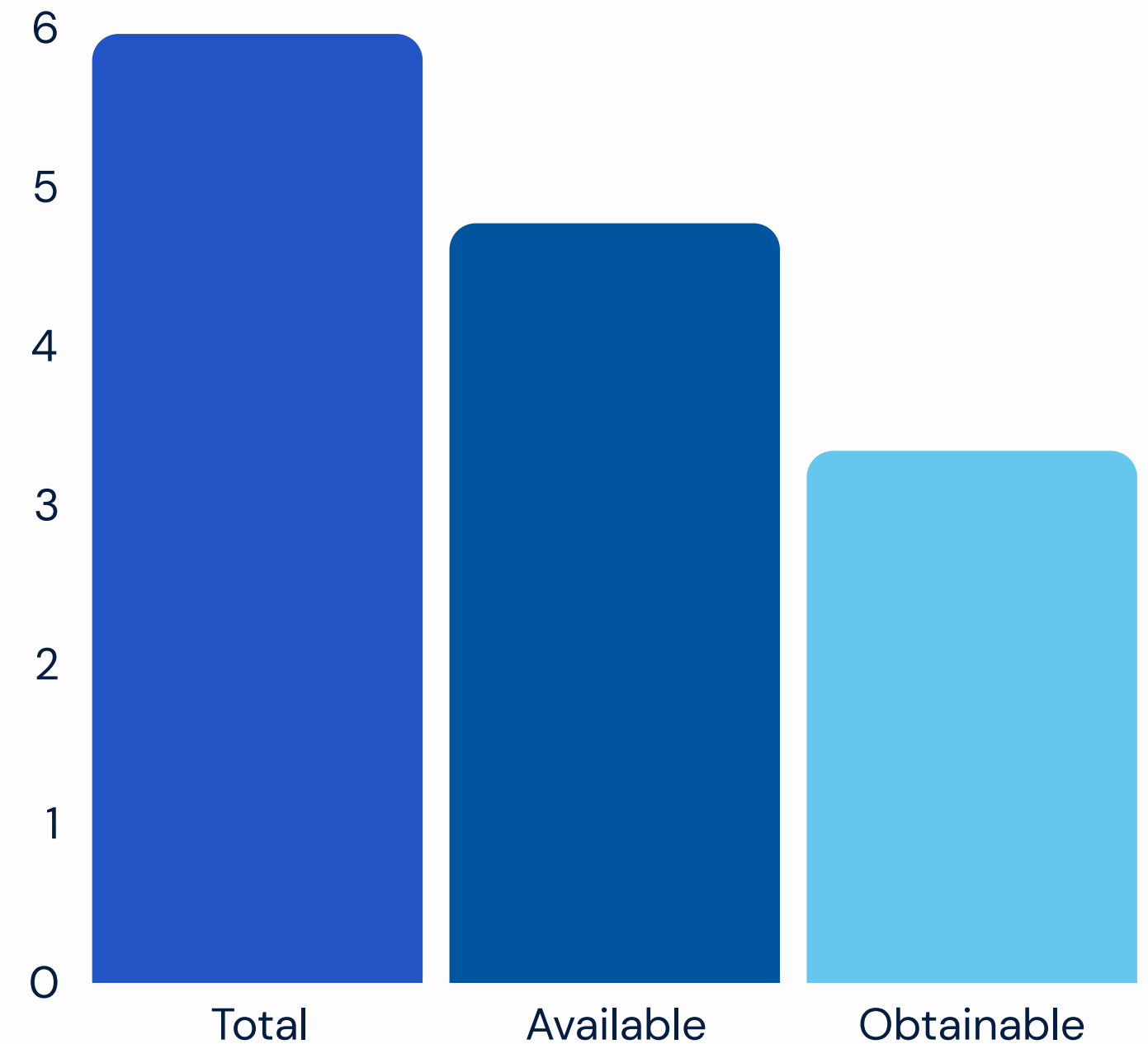
**\$3.34 Billion**

SOM

**138,000+**

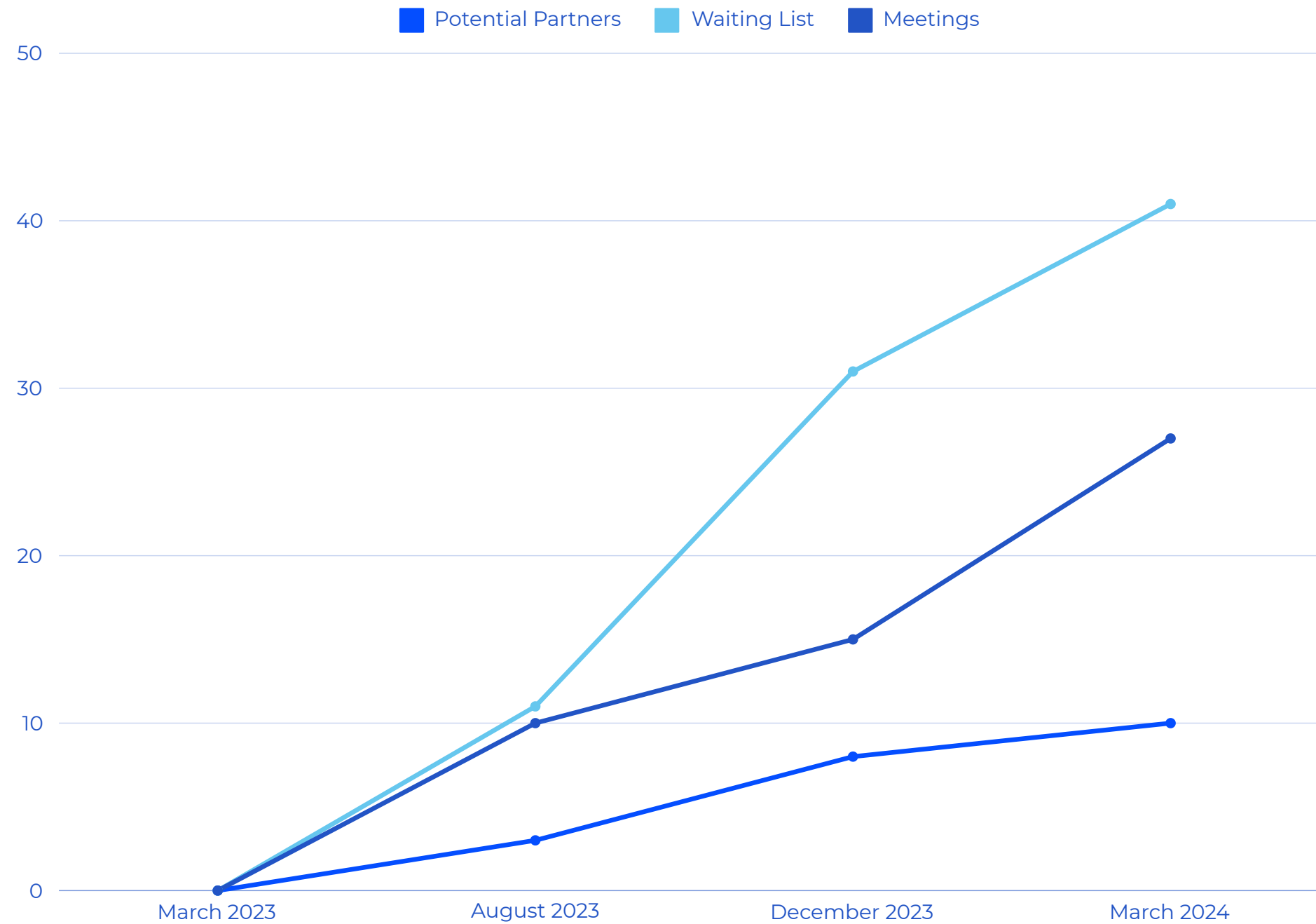
Accounting Firms

\*Assuming \$150/month per workspace and \$30/month per employee.





# Company Traction



**10+  
Firms**

seeking partnership

**27+  
Meetings**

with accountants for  
feedback

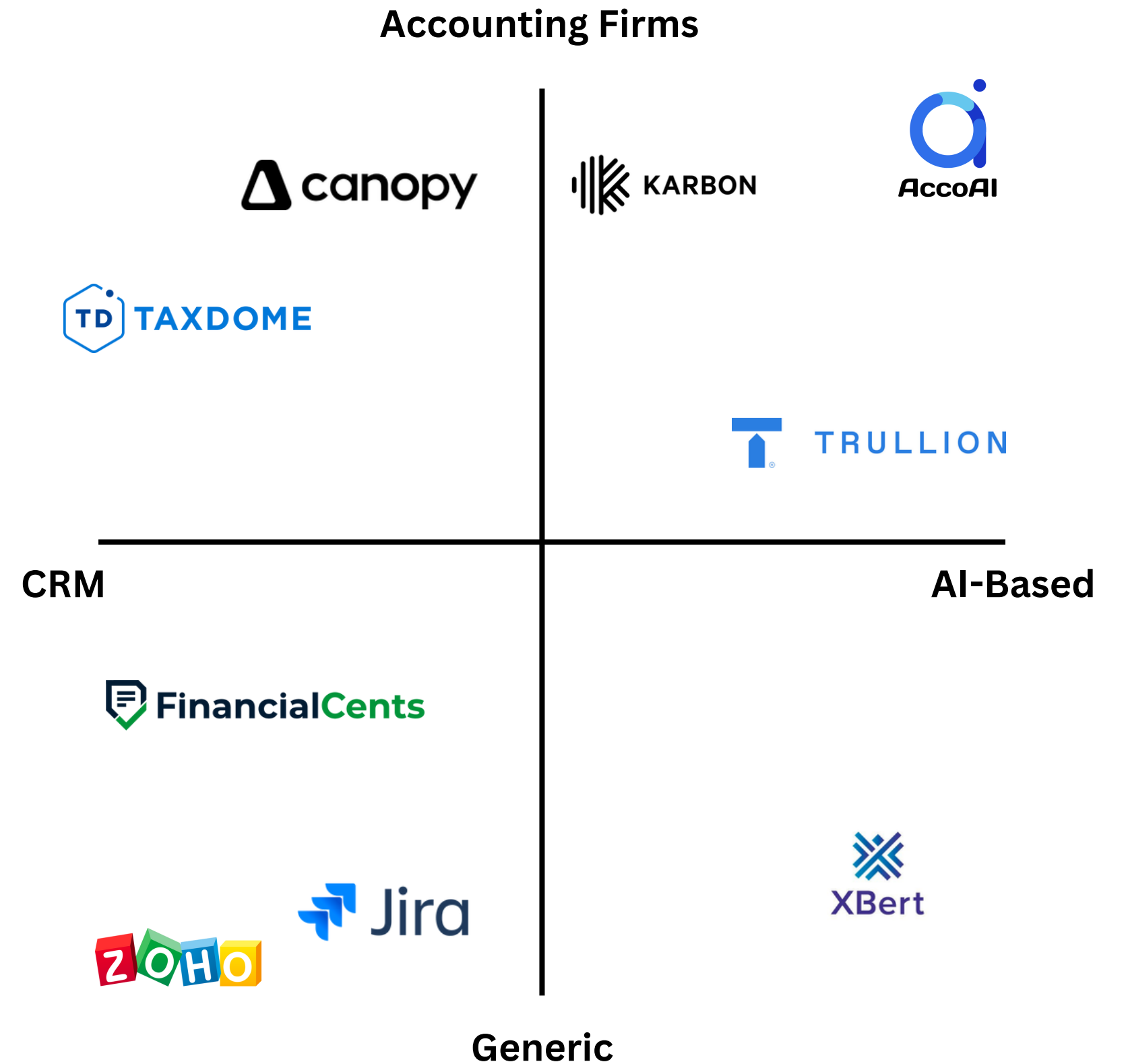
**45+  
Firms**

pre-registered for  
BETA launch



# Competitive Advantage

- Tailored for small, local firms
- Only AI-driven practice management software in accounting sector
- Industry-first, cohesive features
- 66% cheaper than competitors





# Our Team

Lance and Alex, the co-founders, combine technical expertise with 4+ years of experience building web products.

Ruoyu and Raaghav excel in financials and business strategy, offering direct connections within accounting and venture capital.



**Lance Fuchia**

Co-Founder & Co-CEO  
Computer Science



**Alex Loughry**

Co-Founder & Co-CEO  
Computer Science



**Ruoyu Loughry**

CFO  
CPA, Firm Owner



**Raaghav Saxena**

CFO  
Business (Finance)