# AccoA

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

#### Founded by Lance Fuchia & Alex Loughry | accoai.com

### Problem: Accounting is Outdated

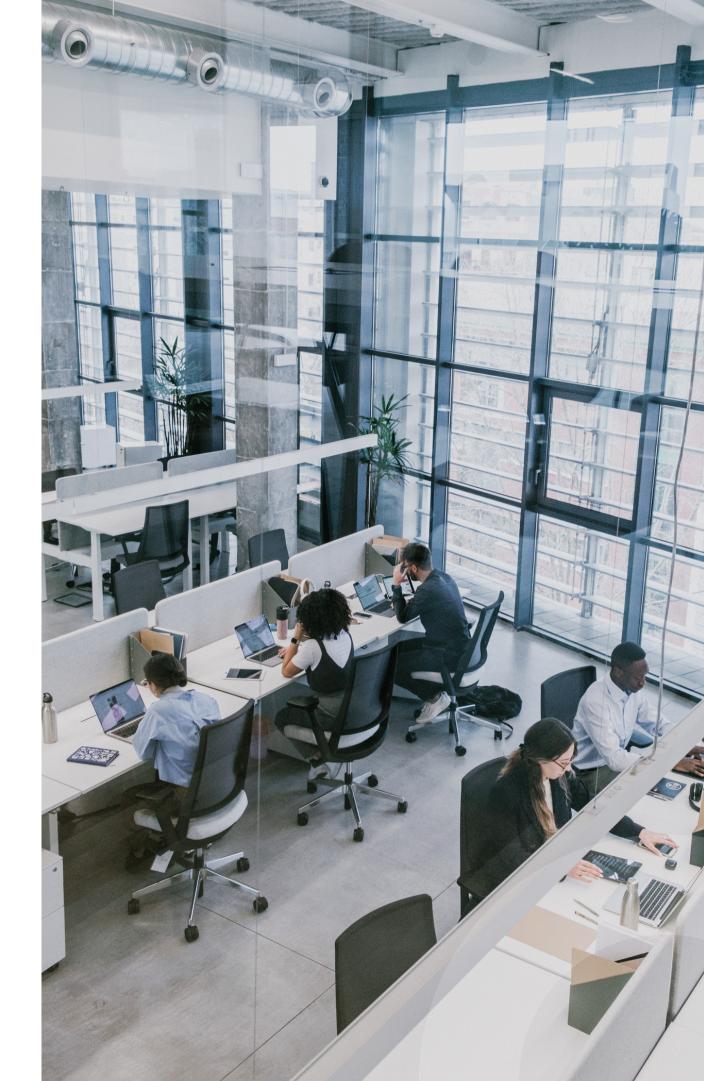
10+ hours wasted weekly on repetitive tasks

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:**

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# Introducing AccoAl

An Al-powered workspace for accounting firms

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Clients list

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#### Interior Design • Baker Consulting

Joined 6/20 · Worth ~\$10,000\*

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

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## **Everything in One Al-Powered Workspace**



### Powerful Suite of AI Tools

### Centralized Firm Workflow



### **Client and Employee Tracking**



Automated Email Management

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.

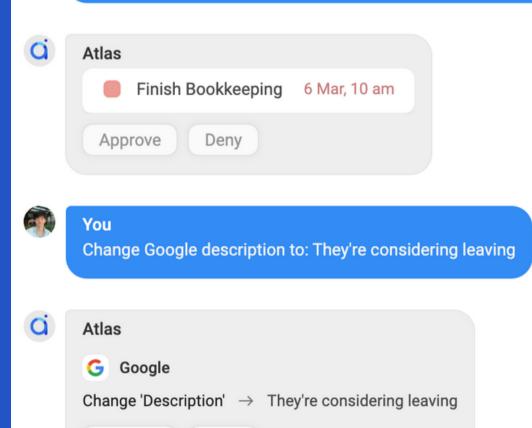
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APP)

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#### You

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





Email Alex to send monthly meeting notes

### **Al Automation** and Tools

Instant task completion and data search with Atlas Chat





24/7 database and workflow updates

Automated client follow ups

### Firm-Wide Collaboration and Insights



Workflow distribution among employees



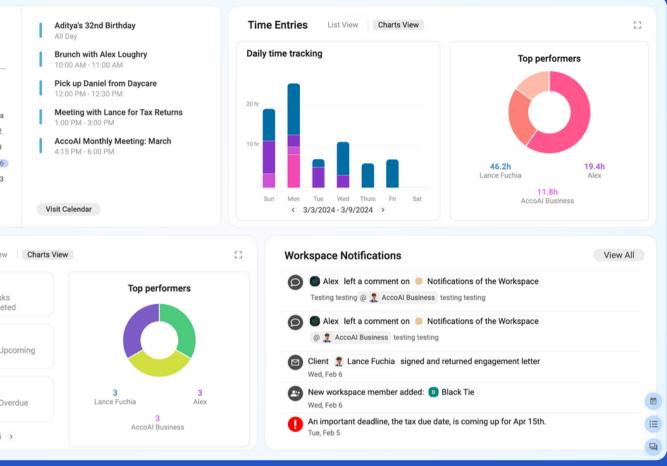
Al productivity insights

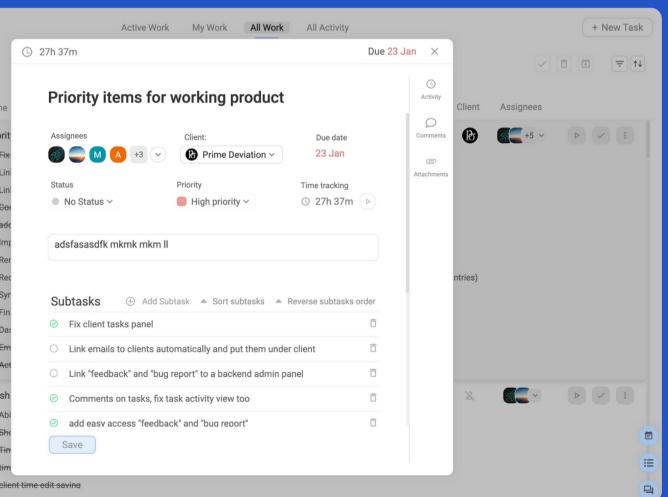


Google Calendar and Outlook integration

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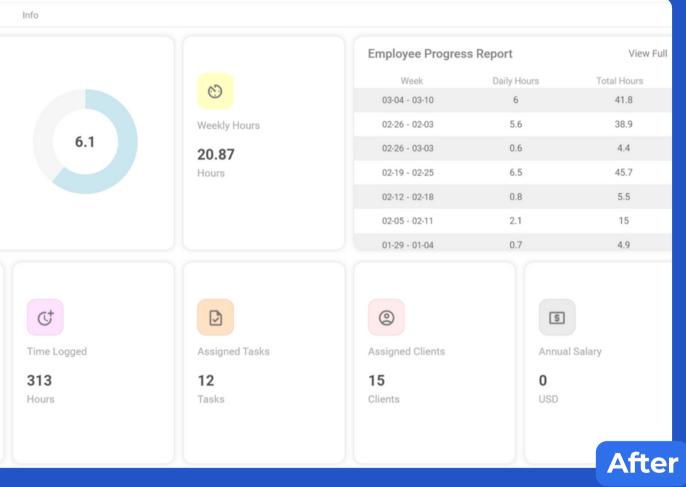
### **Client and Employee Profiles**

Employee ID	• Name •	Hiring Date	Hiring Source	Office -	Department	Job Status		Insights Activity Assigned							
M-0001	Jemima Begum	Hiring Date Employee ID Name Hiring Source	In-House	Main Office	Operations	Full Time									
M-0002	Mercedes Banks		Name	Name	LA LEU		Employee ID	Employee ID	Employee ID	Reference	Main Office	Accounting	Full Time		
M-0003	Macauley Peck						Reference	Main Office	Marketing	Full Time		Atlas Value Score			
M-0004	Hannah Shaw				Website	Main Office	Sales	Full Time		Lance Fuchia's score					
N-0005	Carmel Beltran	Office	Website	Website North Office Sales	Sales	Full Time		is 6.1 (Good).							
N-0006	Sarah-Jayne Morrison	Department	In-House	North Office	Sales	Full Time									
E-0007	Alyce Milner	Job Status Job Title ID / Passport Social Security # Gender Education	Website	East Office	Sales	Part Time									
E-0008	Aviana Kenny		ID / Passport	In-House	East Office	Operations	Full Time	>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>							
M-0009	Harris Montes					In-House	Main Office	Finance	Home Office						
M-00010	Doris Power		Website	Main Office	HR	Full Time									
N-00011	Isobelle Hurley		LinkedIn	North Office	Purchase	Full Time		Ō							
N-00012	Donell Merrill		Date of Birth	LinkedIn	North Office	Sales	Part Time								
N-00013	Jane Best	Nationality	LinkedIn	North Office	Sales	Part Time		Date Joined							
E-00014	Kristofer Dyer	84	Marital Status	Website East Office	East Office	Accounting	Full Time		2023-08-04						
N-00015	Dominykas Xiong	# of Kids	In-House	North Office	Accounting	Full Time		Starting Date							
		Driving License Email				Before									

) Auto-updated by Atlas Al

Real-time activity and stored data





#### Accounting focused attributes

Instant import from Sheets/Excel

### Al-Composed Emails

Available for Meeting?	— # ×
To: Cance Fuchia ×	Cc Bcc
Available for Meeting?	
B ▼ 16▼ Font ▼ 🖍 🗄 ▼ Ξ ▼ 🕅 🕅	Generate an email asking lance if he's available for a meeting tomorrow at 2PM to discuss 2024 tax returns
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, AccoAl	
	AppreciativeConciseConfidentPoliteFriendlyStraightforwardUrgent
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✓ Send <sup>★</sup> <sup>+</sup> Hide Atlas	🗱 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 \$4.77 Billion

TAM

SAM

### \$3.34 Billion

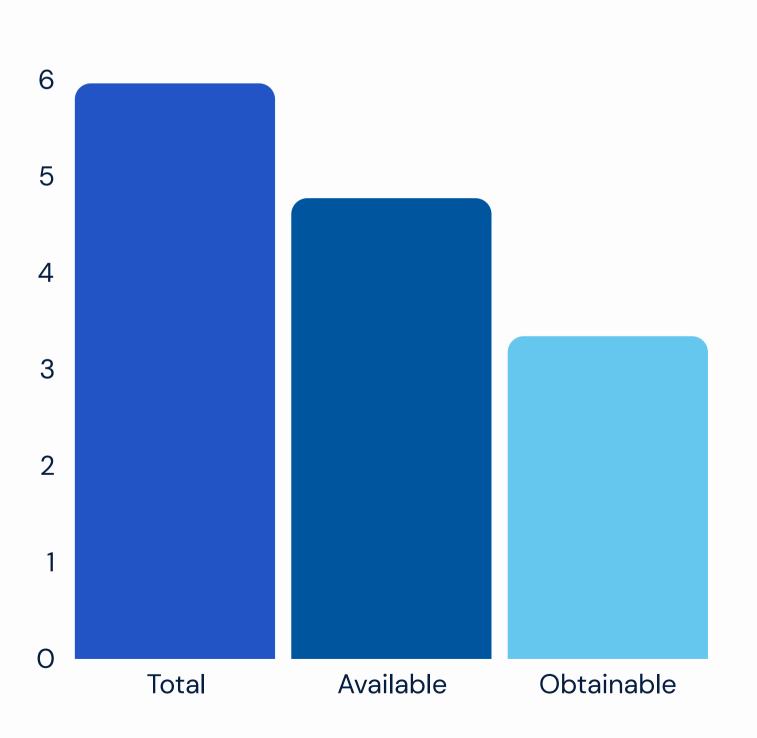
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### 138,000+

Accounting Firms

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





## **Company Traction**







### 10+ Firms

#### seeking partnership

27+ Meetings

with accountants for feedback



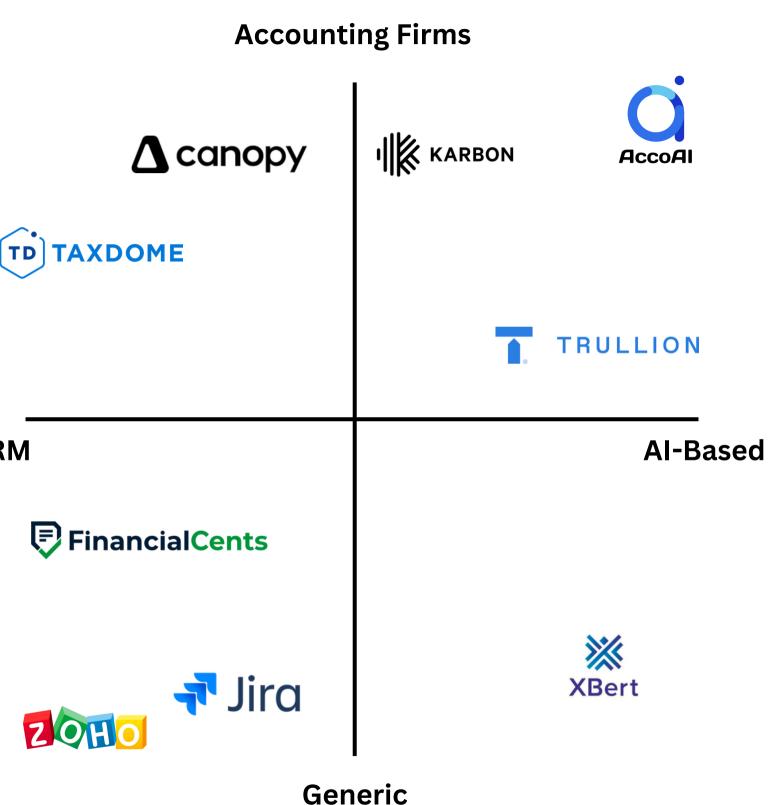
pre-registered for **BETA** launch

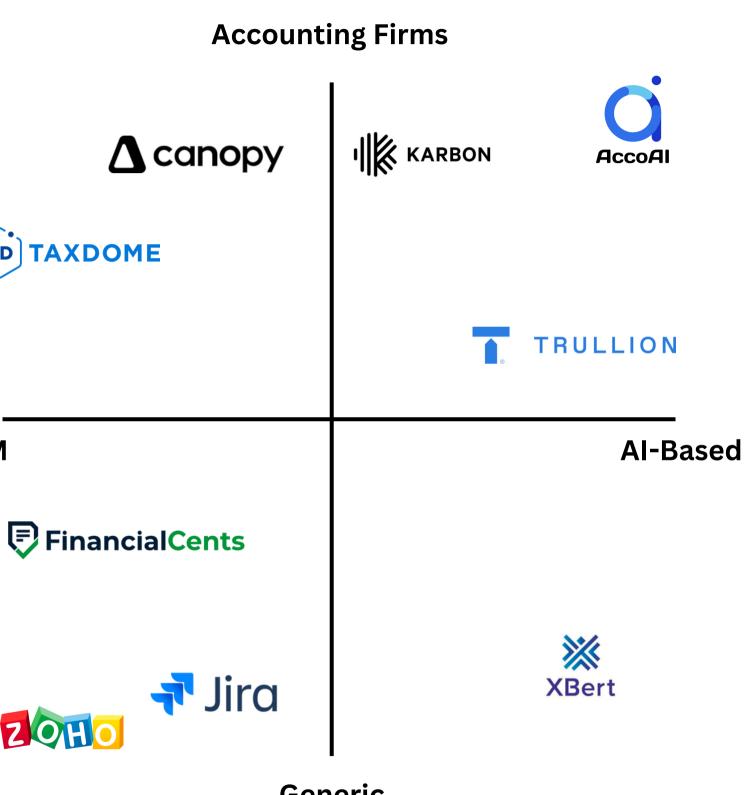
# Competitive Advantage

- Tailored for small. local firms
- Only Al-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

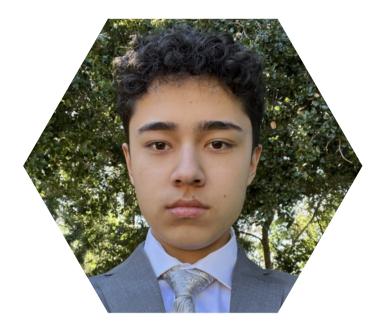
**Co-Founder & Co-CEO Computer Science** 



#### **Ruoyu Loughry**

CFO CPA, Firm Owner





#### **Alex Loughry**

**Co-Founder & Co-CEO Computer Science** 



#### **Raaghav Saxena**

CFO **Business (Finance)**