ROUND INFINITY

FOR ACCOUNTING FIRMS, AUDIT PRACTICES AND TAX TEAMS

Move your firm to agentic.

AI agents vet clients, collect evidence and draft review notes. Partners keep professional judgement and every sign-off.

01 **Clients ready faster**

02 **Every deadline protected**

03 **Scale without more coordinators**



Round Infinity, Inc.

From manual to agentic.

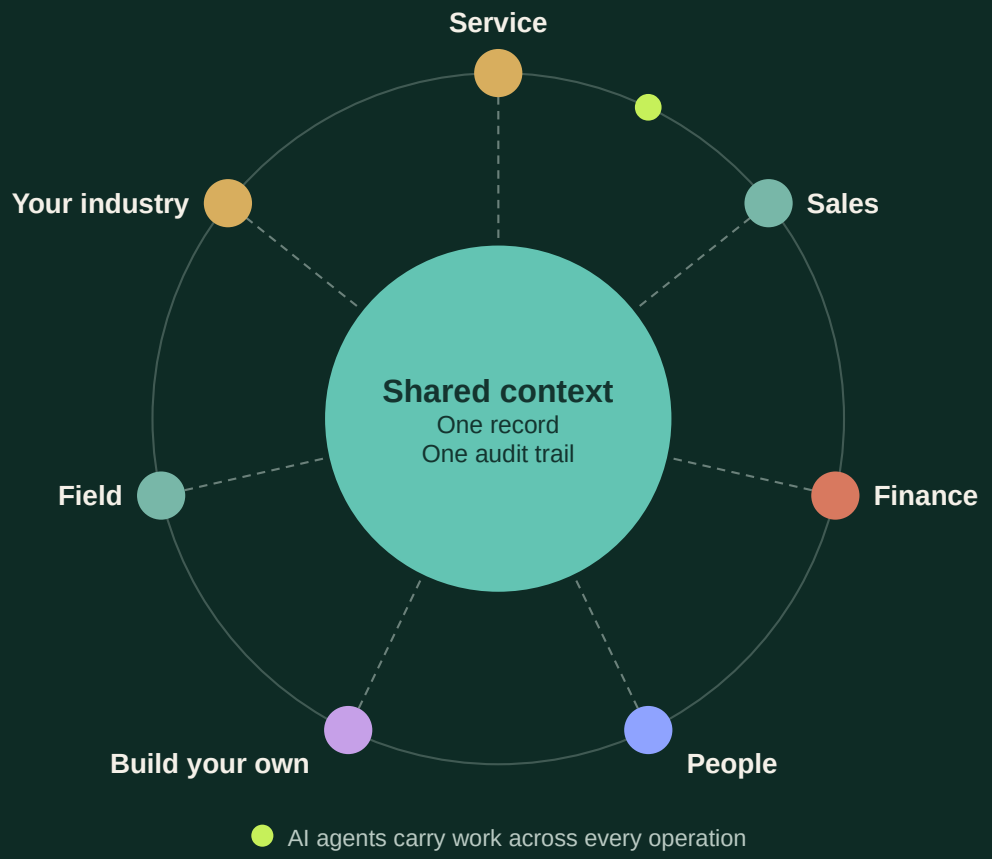
TODAY		WITH ROUND INFINITY
PBC lists rebuilt by hand every year	→	Request lists built from last year's file on day one
Staff chase documents by email	→	Uploads read, matched and chased automatically
Reviewers start from a blank page	→	Workpapers summarized and review notes drafted
Deadline risk seen in the final week	→	Slipping engagements flagged weeks early



Every operation on one shared context.

Your industry's workflows and your core operations run on one shared context. An agent that picks up a task sees every customer, case, contract and payment it touches, and acts across your systems.

One record	Customers, documents and decisions stay connected.
One audit trail	Every action, by an agent or a person, is recorded.
AI agents that act	They prepare, decide within limits and hand off.
People in control	Approvals sit where judgment matters.



One engagement journey, end to end.

Five steps. Pack apps hold the work, AI agents do it, people decide, and a Round Infinity use case completes each step.

01 ACCEPT

Vet every client before you take the engagement

AI AGENT

Client Acceptance

Runs independence, KYC and risk checks.

APP Proposals · Engagement Letters

PEOPLE Partners accept the engagement.

USE CASE **KYC & Onboarding**

→

02 REQUEST

Send the client a ready-made PBC list

AI AGENT

Evidence Request

Builds the PBC list from the prior year and scope.

APP Engagement Manager

PEOPLE Managers confirm the list.

USE CASE **Appointment Scheduling**

→

03 COLLECT

Get client evidence checked and filed

AI AGENT

Document Processing · Client Status

Checks, files and chases client documents.

APP Client Evidence Portal

PEOPLE Staff review exceptions.

USE CASE **Service**

→

04 REVIEW

Clear review notes and client queries faster

AI AGENT

Review Notes

Drafts and tracks review notes to closure.

APP Review Notes & Sign-off

PEOPLE Reviewers clear the file.

USE CASE **Legal Operations**

→

05 FILE & BILL

Sign off, deliver and roll forward

AI AGENT

Deadline & Compliance

Predicts deadline slippage across clients.

APP Compliance Calendar · Billing

PEOPLE Partners sign and bill.

USE CASE **Accounts Receivable**

04 ACCEPT

Every client vetted first.

The Client Acceptance agent checks identity, ownership, conflicts and independence. A partner reviews and decides.

- Identity and ownership
- Prior engagements
- Conflict search
- Independence
- Risk factors

POWERED BY

ACCOUNTING PACK — Engagement Letters · Acceptance agent

+ USE CASE — KYC & Onboarding

PREPARED BY AI AGENT

Illustrative

Acceptance · new audit client

Manufacturing group · 3 entities · FY2026 audit

OWNERSHIP	Parent holds 100% · owners identified
HISTORY	Tax work for a subsidiary in 2023
CONFLICTS	None found across clients and matters
INDEPENDENCE	Confirm no self-review threat from tax work

ACCEPTANCE MEMO

Medium risk · accept subject to independence review

Partner decides · engagement letter drafted

Six engagement agents. Each with a partner.

AGENT 01

Client Acceptance

Runs ownership, conflict and independence checks; drafts the memo.

+ KYC & Onboarding

AGENT 02

Evidence Request

Builds the PBC list from last year's file and chases overdue items.

+ Appointment Scheduling

AGENT 03

Document Processing

Reads and classifies uploads, extracts figures, matches to requests.

+ Service

AGENT 04

Review Notes

Summarizes workpapers, drafts notes on unusual balances, tracks replies.

+ Legal Operations

AGENT 05

Deadline & Compliance

Calculates filing deadlines and predicts which will be missed.

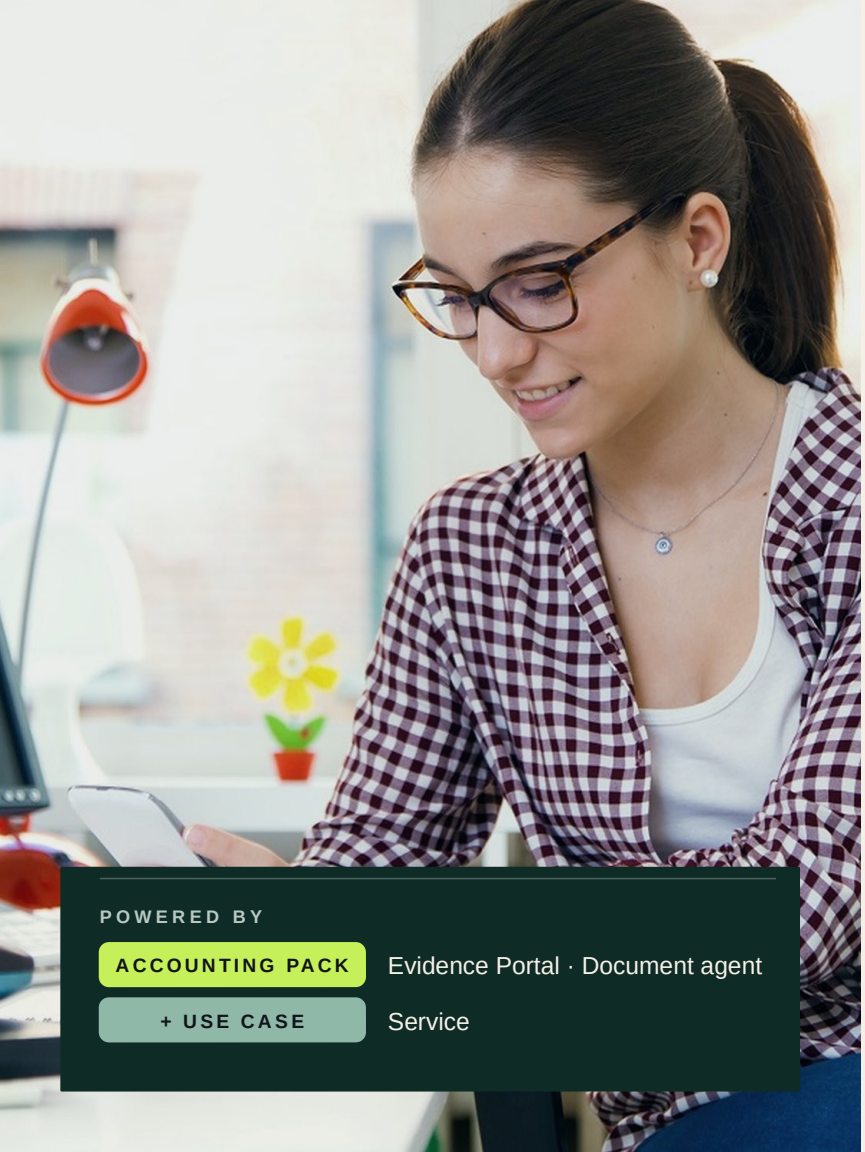
+ Accounts Receivable

AGENT 06

Client Status

Answers clients on email or WhatsApp about outstanding items.

+ Service



POWERED BY

ACCOUNTING PACK — Evidence Portal · Document agent

+ USE CASE — Service

06 COLLECT

Evidence in, without the chasing.

Clients upload to one place. The agent reads each file, matches it to the request and answers what is still due.

ACTIVITY · FY2026 AUDIT · PBC — *Illustrative*

09:00	CLIENT	Accepted the portal invite for the FY2026 audit
09:01	AGENT	Sent PBC list adjusted for a new entity
14:20	CLIENT	Uploaded 12 bank statements and a loan agreement
14:21	AGENT	Matched 12 items · extracted closing balances
14:21	AGENT	Loan schedule 2 missing · asked the client
17:05	CLIENT	Asked on WhatsApp what is still outstanding
17:05	AGENT	Replied: 9 items left, due Friday

07 REVIEW & FILE

Every sign-off traced. Every deadline met.



Review

Reviewers start with a summary of the workpapers. The Review Notes agent flags unusual balances and missing support, drafts notes and tracks every query until it is cleared.

POWERED BY

ACCOUNTING PACK — Review & Sign-off · Review agent

+ USE CASE — Legal Operations

File & bill

Deadlines are tracked by client and jurisdiction, slipping engagements are flagged early, and fees are billed with payment links. After sign-off the file rolls forward.

POWERED BY

ACCOUNTING PACK — Compliance Calendar · Deadline agent

+ USE CASE — Accounts Receivable

08 THE PACK

Eight applications, built for the firm.

Engagement Manager
Budgets, staffing and status per engagement

Client Evidence Portal
PBC requests, uploads, reminders, status

Review Notes & Sign-off
Notes, responses, partner approval trail

Compliance Calendar
Filing deadlines by client and jurisdiction

Engagement Letters & Independence
Templates, conflicts, confirmations

Time & WIP
Time against budget, write-ups, WIP

Proposals & Client Billing
Proposals, recurring billing, payment links

Tax Organizers
Questionnaires and documents per return



Use cases that complete the picture.

All sixteen run on the same record, users and audit trail as the Accounting pack.

● In the Accounting pack

FINANCE

Accounts Payable
80% faster invoice processing

Procurement
Spend controlled before it is committed

● Accounts Receivable
Fees billed and collected with payment links.

● Financial Close
The firm's own close and audit evidence.

PO to Cash
Clean orders, fewer delays

Travel & Expense
Policy enforced before money leaves

CUSTOMERS & REVENUE

● Service
Client questions on email and WhatsApp.

● Appointment Scheduling
Kick-offs and client meetings booked.

Field Service
Higher first-time fix, billed on site

Prospecting
Faster response to buying intent

● Sales Execution
Proposals and engagements tracked to signed.

Online & In-Store Sales
More sales recovered, promises kept

PEOPLE & CONTROL

● Recruitment
Busy-season and graduate hiring.

● KYC & Onboarding
Client identity and ownership checks.

● Legal Operations
Engagement terms and scope changes.

PLATFORM

Build Your Own
From idea to live operation, fast

START WHERE IT HURTS

Pick the operation with the most delay, manual effort, customer friction, control risk or cash impact. Finish it end to end, then add the next.

Tracked from request to done.

WORKFLOWS

Client acceptance and continuance	Annual risk and independence review
PBC request, chase and reconcile	From list to reviewed evidence
Preparer to partner sign-off	Review levels with notes cleared
Recurring compliance cycles	Filings created automatically
Scope change and fee variance	Approved before work is done
Filing status tracking	Prepared, signed, filed, acknowledged

DASHBOARDS



Engagement status

Progress and budget vs actual



Outstanding PBC items

What each client still owes



Deadline risk

Filings at risk this month



Utilization and realization

Hours, recovery, write-offs

All-in-one for accounting firms.

No separate practice-management software needed. Proposals, engagements, evidence, reviews, deadlines and billing run on one platform.

Clients | **Staff** | **Reviewers** | **Partners**

ROUND INFINITY — ACCOUNTING PACK

Agents · workflows · apps · one audit trail

Xero / QuickBooks / NetSuite | **Tax & audit software** | **Document storage** | **E-signature**

Ledgers, tax and audit tools connect in.

INCLUDED WITH EVERY SUBSCRIPTION

- AI Execution Engine
- AI Agent Builder
- Workflow Automation
- Customer 360
- Apps & Portals
- Integrations & APIs

Price the full journey, not just the pack.

Platform

Named users and the core platform

+

Accounting & Audit pack

Apps, agents, workflows and dashboards above

+

Use cases

Service · Accounts Receivable · KYC & Onboarding · Sales Execution

+

Usage

AI, voice and messaging — pay as you use

One platform, one data model, one user set, one audit trail. The pack and your use cases share all of it.

Price your operation → roundinfinity.com/pricing

ROUND INFINITY

NEXT STEP

See it run on your next busy season.

01	**Walkthrough**	Map acceptance, PBC, review and filing
02	**Demo**	See the agents run an engagement
03	**Quote**	Platform, pack and usage — sized to you

Book a demo →

roundinfinity.com