ROUND INFINITY

FOR LAW FIRMS, CORPORATE LEGAL TEAMS AND LEGAL PROVIDERS

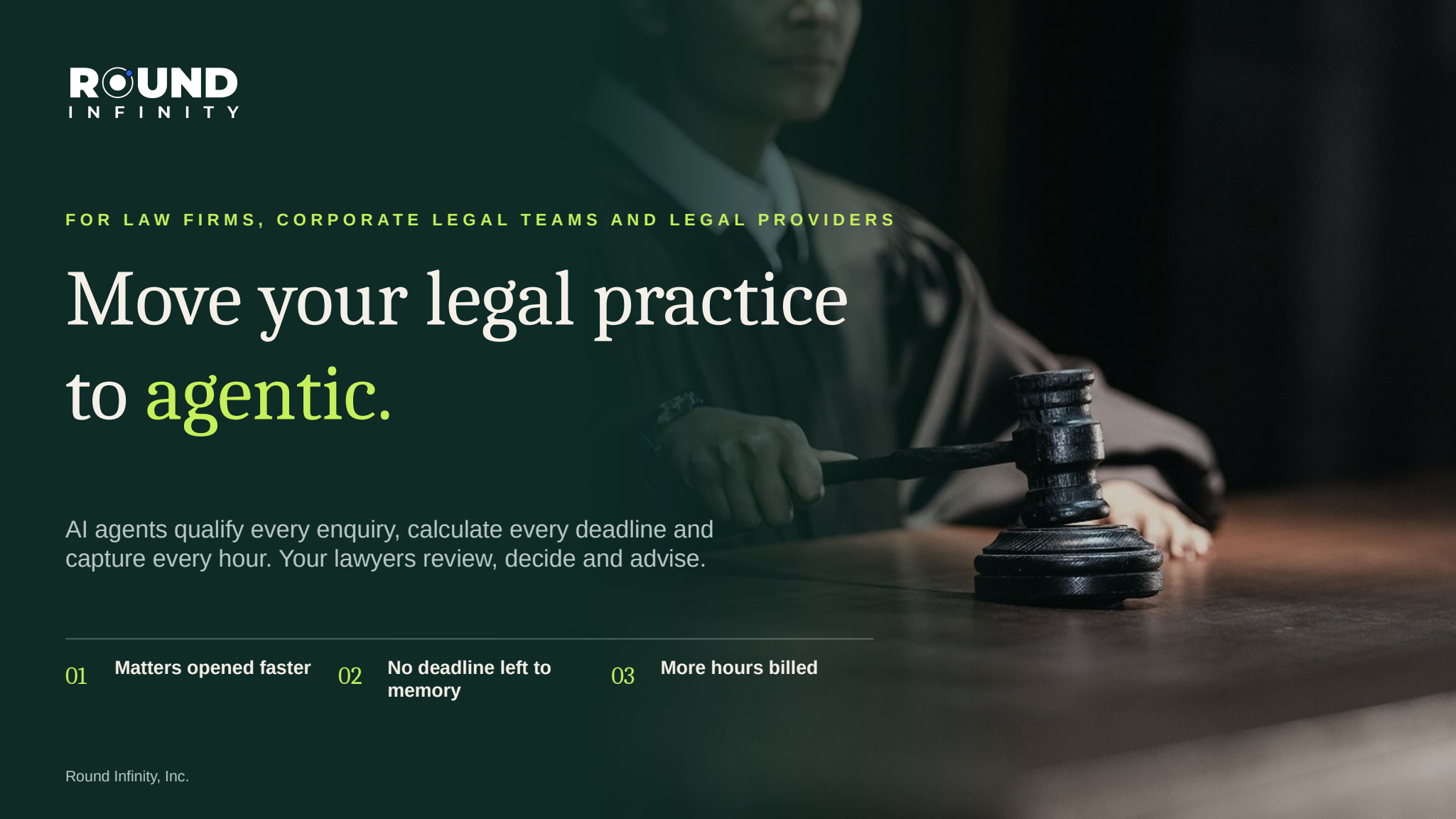
Move your legal practice to agentic.

AI agents qualify every enquiry, calculate every deadline and capture every hour. Your lawyers review, decide and advise.

01 **Matters opened faster**

02 **No deadline left to memory**

03 **More hours billed**



Round Infinity, Inc.

From manual to agentic.

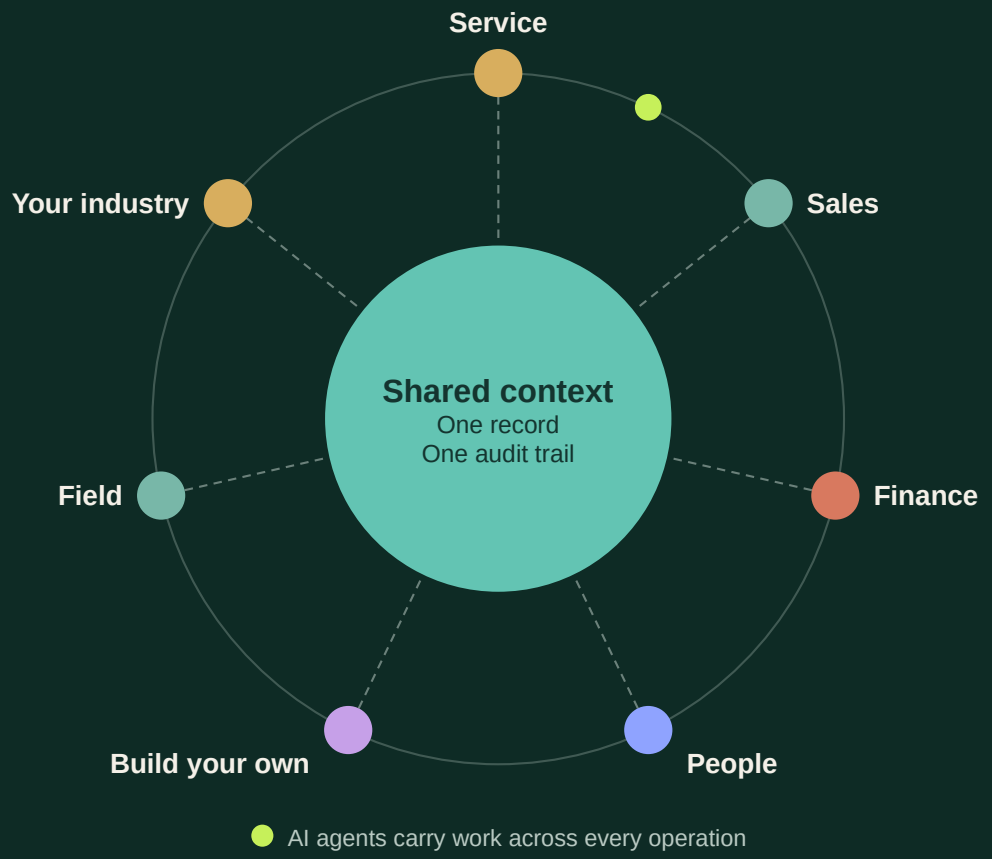
TODAY		WITH ROUND INFINITY
Intake notes retyped into a new matter	→	Facts, parties and urgency captured at first contact
Conflicts searched one spelling at a time	→	Parties, entities and name variations searched together
Deadlines live in personal calendars	→	Dates calculated from court rules, with reminders
Hours lost between tasks	→	Time suggested from emails, documents and calendar



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 matter 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 INTAKE

Capture every new matter with facts and urgency

AI AGENT

Legal Intake

Captures facts, urgency and contact details from enquiries.

APP Legal Intake

PEOPLE Partners accept the matter.

USE CASE **Appointment Scheduling**

02 CLEAR

Clear conflicts before you open the matter

AI AGENT

Conflict Check

Searches every name variation across matters.

APP Conflict Check

PEOPLE Risk partners clear hits.

USE CASE **KYC & Onboarding**

03 DOCKET

Set every deadline and keep the matter moving

AI AGENT

Matter Operations

Sets court and contract dates and tracks tasks.

APP Docketing · Matter Workspace

PEOPLE Lawyers own the strategy.

USE CASE **Service**

04 DRAFT

Draft documents from your precedents

AI AGENT

Document Workflow

Assembles first drafts from your precedents.

APP Document Assembly

PEOPLE Lawyers review and sign.

USE CASE **Legal Operations**

05 BILL

Capture time and bill without leakage

AI AGENT

Legal Billing & Collections

Suggests time entries and prepares pre-bills.

APP Time Capture · Billing & Trust

PEOPLE Partners approve bills.

USE CASE **Accounts Receivable**

04 CLEAR

Matters ready before review.

Intake and conflict searches arrive as one summary. A lawyer reviews and the engagement letter goes out for signature.

- Facts and parties
- Related entities
- Conflict hits
- Suggested practice area
- Engagement terms

POWERED BY

LEGAL PACK — Conflict Check · Conflicts agent

+ USE CASE — KYC & Onboarding

PREPARED BY AI AGENT

Illustrative

New matter · lease dispute

Web enquiry yesterday 17:40 · new client

CLIENT	Regional retail chain · 14 stores
PARTIES	Landlord LLC and its parent company
CONFLICTS	1 possible hit: parent company, 2019 matter
URGENCY	Notice to vacate in 21 days

FOR THE CONFLICTS TEAM

Review the 2019 hit · likely an unrelated subsidiary

Lawyer decides · engagement letter drafted

Six legal agents. Each with a partner.

AGENT 01

Legal Intake

Interviews enquirers, captures facts and urgency, books consultations.

+ Appointment Scheduling

AGENT 02

Conflict Check

Searches parties and related entities, including name variations.

+ KYC & Onboarding

AGENT 03

Matter Operations

Calculates deadlines from court rules and reminds lawyers early.

+ Service

AGENT 04

Legal Knowledge Assistant

Answers from your precedents and briefs, with citations.

+ Legal Operations

AGENT 05

Document Workflow

Drafts letters, pleadings and agreements; routes for signature.

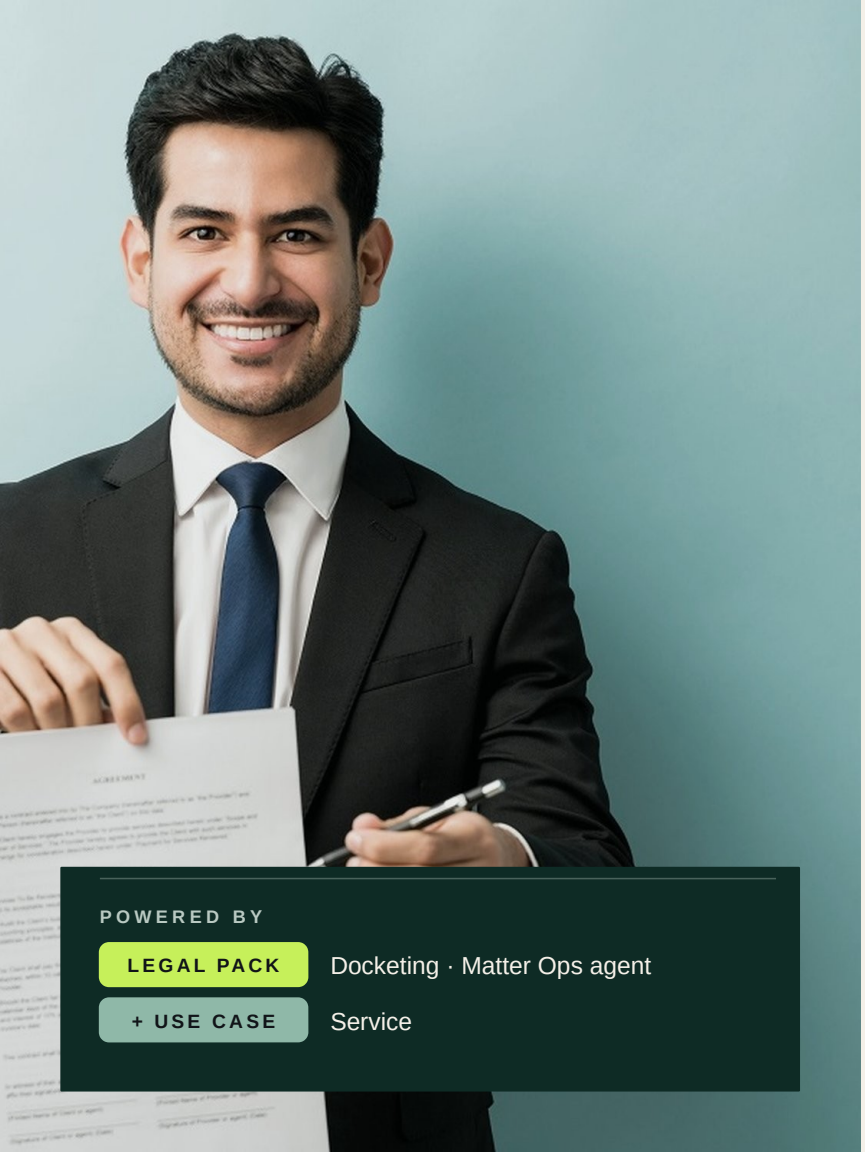
+ Legal Operations

AGENT 06

Billing & Collections

Suggests time entries, prepares pre-bills, follows up unpaid invoices.

+ Accounts Receivable



POWERED BY

LEGAL PACK Docketing · Matter Ops agent

+ USE CASE Service

06 DOCKET

No deadline left to memory.

Deadlines are calculated from court rules and filings, and the responsible lawyer is reminded well before each date.

ACTIVITY · MATTER 2026-0418 *Illustrative*

09:00	COURT	Filing served: motion to dismiss
09:02	AGENT	Calculated the response deadline from court rules
09:02	AGENT	Created tasks · reminders at 10, 5 and 2 days
09:03	AGENT	Pulled 3 precedents for the opposition
14:30	ASSOCIATE	Working from the generated first draft
08:00	AGENT	Reminder: response due in 5 days
16:45	PARTNER	Reviewed and approved the filing

More hours billed. Trust kept clean.



Draft

Lawyers ask questions of your own precedents and get answers with sources. First drafts of letters, pleadings and agreements are built from matter data and routed for review and signature.

POWERED BY

LEGAL PACK — Document Assembly · Document agent

+ USE CASE — Legal Operations

Bill

Time entries are suggested from emails, documents and calendar activity. Pre-bills are prepared for review, trust balances are tracked, and unpaid invoices are followed up.

POWERED BY

LEGAL PACK — Billing & Trust · Billing agent

+ USE CASE — Accounts Receivable

Eight applications, built for legal practice.

Legal Intake
Enquiries, intake forms and matter opening

Conflict Check
Parties, related entities, hits, waivers

Matter Workspace
Matters, parties, tasks, documents, notes

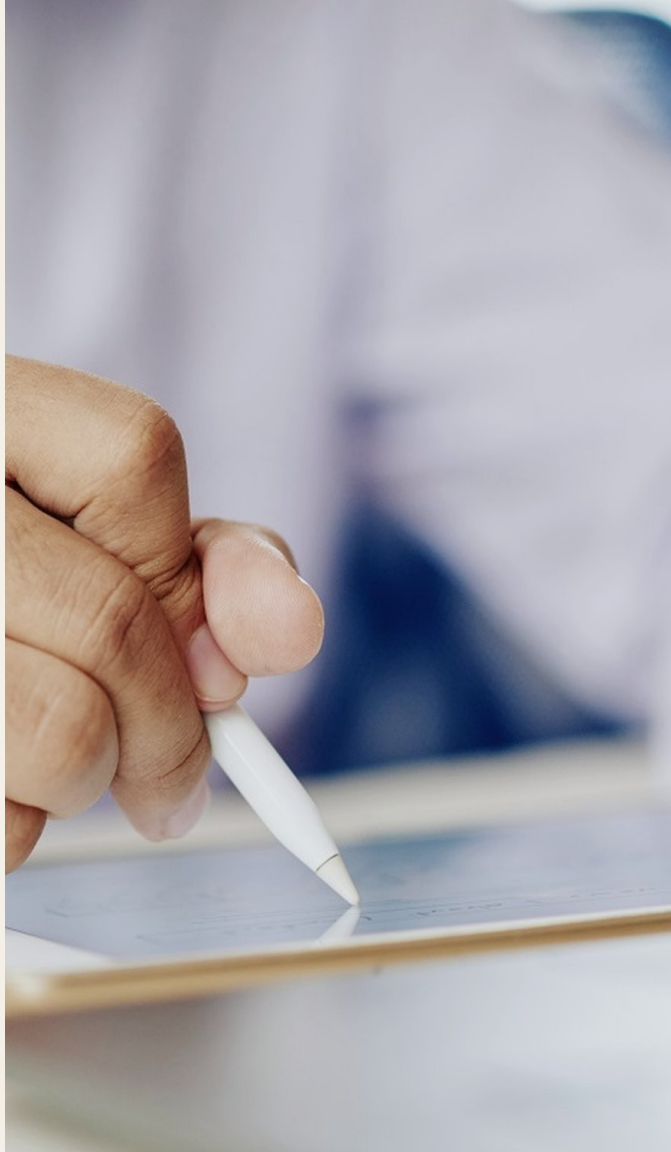
Docketing & Deadlines
Court-rule and statutory dates, one calendar

Time & Expense Capture
Timers, AI time suggestions, disbursements

Matter Billing & Trust Ledger
Pre-bills, invoices, trust balances

Document Assembly
Letters, pleadings, agreements from matter data

Client Portal
Secure documents, invoices, messages, uploads



Use cases that complete the picture.

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

● In the Legal pack

FINANCE

- **Accounts Payable**
  Disbursement and vendor invoices paid.

Procurement
Spend controlled before it is committed

- **Accounts Receivable**
  Invoices and aged balances collected.

Financial Close
Slips seen before reporting is at risk

PO to Cash
Clean orders, fewer delays

Travel & Expense
Policy enforced before money leaves

CUSTOMERS & REVENUE

- **Service**
  Client questions and updates on every channel.
- **Appointment Scheduling**
  Consultations booked, reminded and confirmed.

Field Service
Higher first-time fix, billed on site

- **Prospecting**
  Referral sources and prospective clients engaged.

Sales Execution
Shorter cycles, protected margin

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

PEOPLE & CONTROL

- **Recruitment**
  Associates and staff hired and onboarded.
- **KYC & Onboarding**
  Client identity and AML checks before engagement.
- **Legal Operations**
  Contract lifecycle for corporate legal teams.

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

Intake to engagement letter	Qualified, cleared and engaged
Client onboarding (KYC)	Identity and source-of-funds checks
Conflict search and waiver	Search, review, record the decision
Deadline calculation	Dates from court rules, with reminders
Pre-bill review	Edits, write-offs and approval
Matter closure and retention	Close, archive, set retention

DASHBOARDS



Intake conversion

Enquiries to opened matters



Upcoming deadlines

By lawyer and matter



Utilization and realization

Billed versus worked

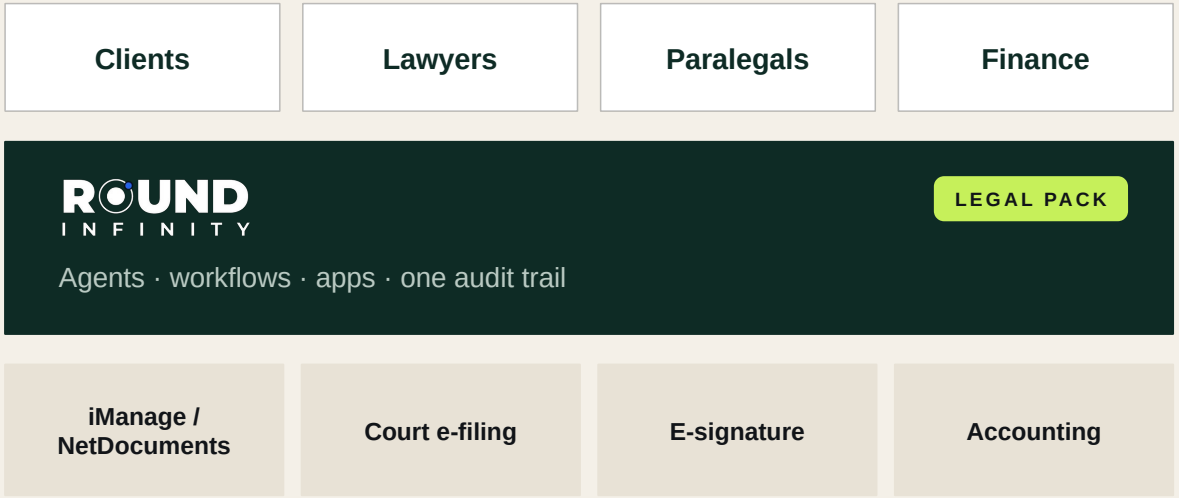


WIP and aged unbilled

What is waiting to be billed

All-in-one for legal practice.

No separate practice-management software needed. Intake, conflicts, matters, deadlines, documents, time, billing and trust run on one platform.



Document management, e-filing and accounting 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

+

Legal Services pack

Apps, agents, workflows and dashboards above

+

Use cases

Accounts Receivable · Service · Appointment Scheduling · KYC & Onboarding

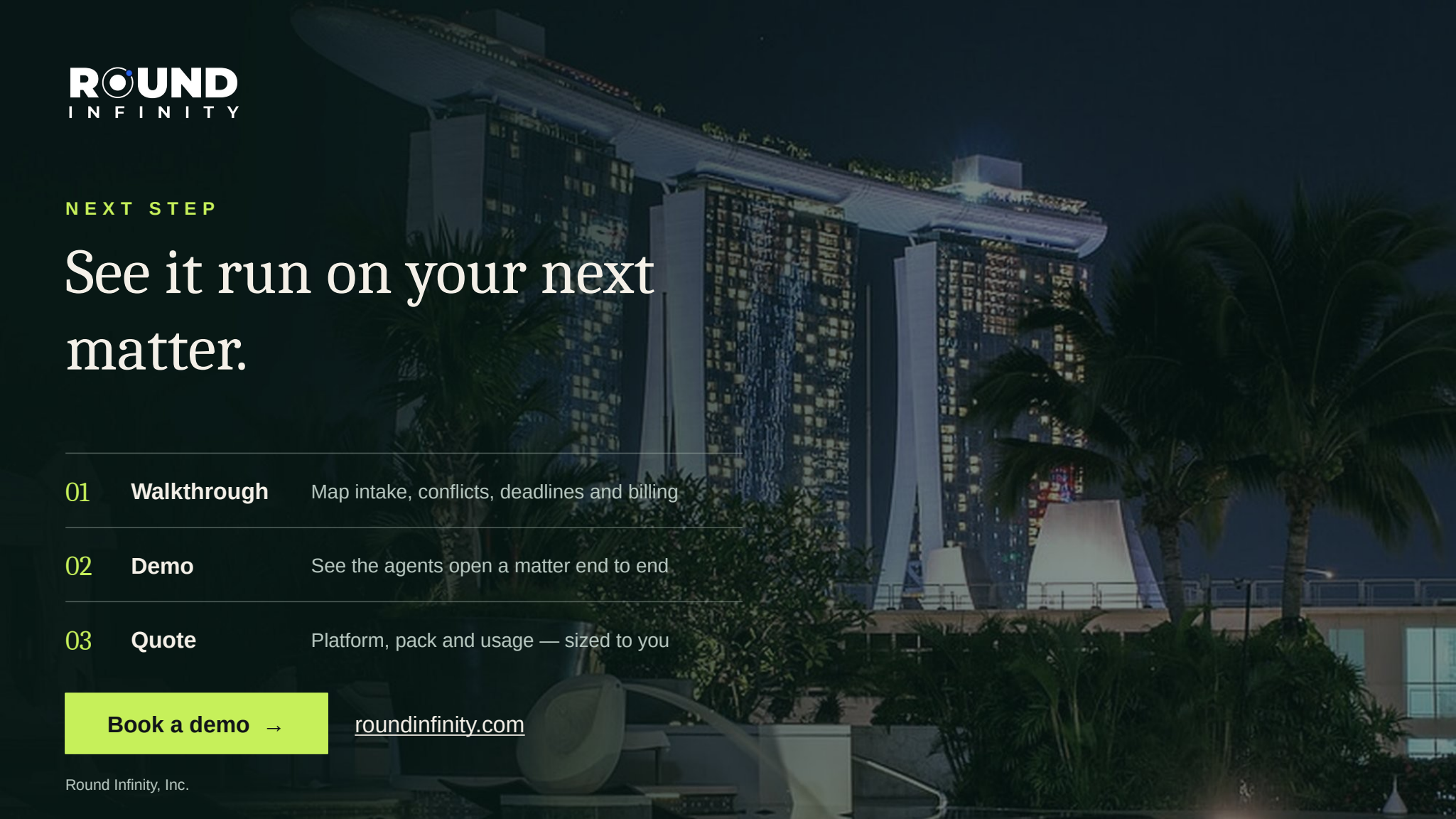
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Usage

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 matter.

01	**Walkthrough**	Map intake, conflicts, deadlines and billing
02	**Demo**	See the agents open a matter end to end
03	**Quote**	Platform, pack and usage — sized to you

Book a demo →

roundinfinity.com

Round Infinity, Inc.