FOUR WAYS WE HELP CPA FIRMS

More advisory clients, *less busy-season admin.*

Documents arrive by email, text, and portal, and busy-season leads overwhelm the front desk. We build the systems that tame the clutter and route advisory-fit clients to the partner.

1

CUSTOM WEB

A site that ranks for advisory

Clear service pages and thought-leadership content, built to read cleanly to AI and position the firm for business tax and advisory searches.

2

AI VISIBILITY

Found for business tax searches

Get cited when a business owner asks an AI for "a CPA firm in Miami" or "tax advisory near me." We fix the signals AI uses to recommend a firm.

3

CUSTOM SAAS

Busy season without the clutter

AI document triage and smart filing tied into your client portals, plus intake forms that screen and sort clients by revenue and needs.

4

CUSTOM AI & FRACTIONAL CAIO

An assistant that screens intake

An assistant that answers common questions and screens tax-season inquiries, so unqualified leads are filtered and advisory-fit clients reach the partner.

Built with Circular 230 and client confidentiality in mind: careful automated document handling and clear scope on every client-facing tool.

WHERE TO START

Start with an AI Visibility audit.

We score where you stand in AI search today, show the gaps against competitors, and lay out a 90-day plan. It is priced on its own.