

AI INTAKE ORGANIZER

# End Document Chaos. *For Good.*

Clerical chaos from client intake is eating your margins. Clients ignore requests, send wrong docs, upload late — and your staff is stuck sorting it all during peak season.



## WHAT SUCKS NOW

- ◆ **Wrong or missing files**  
Clients forget or send the wrong docs
- ◆ **No visibility**  
Chasing status across folders & spreadsheets
- ◆ **Manual file sorting**  
Renaming and matching uploads by hand

## HOW COLLECT FIXES IT

- ◆ **Smart checklists**  
Personalized reminders, no difficult logins
- ◆ **One dashboard**  
Every client's status — searchable, exportable
- ◆ **AI auto-sort**  
Scans, names, and matches docs instantly

## Why Firms Love It

*“89% of our clients successfully used Collect in the first year! We were able to take on more returns than expected without sacrificing quality”*

Aiola CPA

## BUILT BY ACCOUNTANTS, FOR ACCOUNTANTS

# AI that understands accounting workflows and pains — not a generic tool bolted onto your process.



### Your brand, your look

White-labeled, secure, client-friendly — regardless of their tech level



### Personalized checklists

Custom questionnaires and document request lists for each client



### Instant setup

Import



### All client types

Personal, business, bookkeeping, payroll, tax planning



### Auto-reminders

SMS and email nudges until docs are uploaded — no manual follow-up



### Auto PDF conversion

Every upload converted to PDF automatically — consistent, clean files

## THE ROI IS REAL

**<30 days** To positive ROI for most firms

**83 min+** Saved per return on average

# Ready To Collect Every Doc — Without The Chaos?

