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Summarize client documents and follow up faster

AI tools for bookkeeping and tax firms: document summary, client letters, and email in one workflow

About 8 minutes of slides · Three live demos on the platform (~7 minutes)



Presented by: Mohd Naeem, Founder & CEO

25+ years in development, architecture, and DevSecOps. Enterprise experience, built for small business teams

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Agenda

What we will cover in the next few minutes

Section	Topics	Time
1	Problem · What we built · Keep what works · Sound familiar · How it works	~3 min
2	Three walkthroughs: Documents · Reminders · Bulk Email (scenario, solution, demo on each slide)	~8 min
3	Common questions · Pilot · Pricing · Why trust us · AI Platform tech stack	~4 min
4	Your next step · Q&A	Open



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AI MADE EASY FOR YOUR BUSINESS

The problem

Tackle the daily work that slows you down

AI built for your industry

- ✓ We augment your existing tools (tax prep, QBO, and client portals). We do not replace them.
- ✓ Summaries, client letters, and chase emails in clear steps, not a blank ChatGPT tab
- ✓ Same workflow every time. Upload once, move to the next step. No re-typing between apps
- ✓ Human review before every send. Drafts only, not autopilot.

What we solve

Time · Money · Priority

- ✓ Time: hours back on shoebox PDFs and repetitive client emails
- ✓ Money: clients stay when you chase missing docs on schedule
- ✓ Priority: finish month-end work that piles up across clients



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AI MADE EASY FOR YOUR BUSINESS

What we built

One login, accounting & bookkeeping apps, and everyday business tools

Your company workspace

- ✓ One business account
- ✓ Accounting & bookkeeping industry chosen once
- ✓ Team logins by plan

Accounting Apps

- ✓ Tax document summarizer and bookkeeping explainer
- ✓ Client letters, month-end checklists, compliance review

Everyday Tools

- ✓ Client Relationship Reminders and Bulk Email Processor
- ✓ Documents and financial narratives

How It Feels on Document Day

- ✓ Open Summarize client documents, run step one, tap Continue. The next app opens with your draft.
- ✓ Tax Document Summarizer, Client Letter Drafter, and AI Email Automation: same path every client
- ✓ Your admin connects your AI account once (OpenAI, Together, Groq, xAI, and more)
- ✓ We augment your existing tools (tax prep, QBO, and client portals). We do not replace them.



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Keep what already works

Your existing tools, plus a writing and email layer

Your tax & bookkeeping stack

QBO, tax prep, and client portals stay where they are

Document collection tools

Your existing portals and file shares

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Summaries, client letters, and email. Same path each time.

We augment your existing tools (tax prep, QBO, and client portals). We do not replace them.

Faster Summaries · Consistent Client Letters · Less Staff Typing



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AI MADE EASY FOR YOUR BUSINESS

Sound familiar?

Staff paste bank PDFs into ChatGPT without partner approval or audit trail

Free ChatGPT or Copilot

- ✗ Open a blank chat and re-summarize every client PDF
- ✗ Copy summary, client letter, and chase email in separate steps
- ✗ **Free ChatGPT or Copilot may use your prompts for training and model improvement**
- ✗ **You are tied to one provider and one personal account**

With EZ4YouTech.com

- ✓ One document workflow: same steps every time with Continue
- ✓ Summarize client documents: Tax Document Summarizer, Client Letter Drafter, AI Email Automation
- ✓ **Your company workspace and your AI accounts. We do not train on your client data**
- ✓ **Your admin connects your provider once: OpenAI, Together, Groq, xAI, and more**



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AI MADE EASY FOR YOUR BUSINESS

How it works

Three steps for your team. No IT project required.

1

Connect once

- ✓ Your admin links your company's AI account once
- ✓ The whole office shares one secure workspace

2

Summarize Client Documents

- ✓ Tax Document Summarizer → Client Letter Drafter → AI Email Automation
- ✓ Tap Continue between steps. Same path every client file.

3

Try free

- ✓ 2-month pilot with platform fee waived
- ✓ Test on real client PDFs before you decide

You pay your AI provider directly. Our fee covers the apps and workspace, not your token usage.



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Walkthrough 1: Summarize Client Documents

Scenario 1

A 12-page bank PDF arrives. The client still needs a chase email.

- ✗ Shoebox PDFs need a review-ready summary before tax prep starts.
- ✗ Chase emails repeat the same wording for every missing document.
- ✗ Staff verify totals manually after ChatGPT guesses wrong.

Solution 1: Document Workflow

Three steps, same path every client file.

- ✓ 1 · Tax Document Summarizer: Review-ready transaction summary
- ✓ 2 · Client Letter Drafter: What we still need from you letter
- ✓ 3 · AI Email Automation: Send chase email or copy to Outlook

Summarize the document, draft the client letter, and queue the chase email in one path.

Demo 1: Summarize Client Documents

Live on the platform · About 3 minutes · Starter plan and above

- ✓ Open Summarize Client Documents
- ✓ Tax Document Summarizer, Client Letter Drafter, AI Email Automation
- ✓ Tap Continue between steps. Same path every client.



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Faster Summaries · Consistent Client Letters · Less Staff Typing



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Walkthrough 2: Client Follow-Up

Scenario 2

Birthdays and anniversaries slip when daily client work stacks up.

- ✗ You mean to send birthday notes, but client work wins every week.
- ✗ Each email is written from scratch or copied from an old template.
- ✗ Your CRM has the dates. Turning them into send-ready drafts still takes time.

Solution 2: Client Reminder Workflow

Three steps from CSV to sent email.

- ✓ 1 · Upload CSV: Rows ready for draft generation
- ✓ 2 · Review Drafts: Edit anything before you approve
- ✓ 3 · Send: Send approved emails from your account

Review drafts, send all due reminders, or set auto-send and forget the follow-up pain.

Demo 2: Client Reminders

Live on the platform · About 2 minutes · Growth plan and above

- ✓ Open Client Relationship Reminders
- ✓ Upload your client CSV and review draft emails.
- ✓ Approve and send from Microsoft 365.



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Stay in Touch · Clients Feel Remembered · Less Manual Typing



Walkthrough 3: Inbox Backlog

Scenario 3

Saved emails and replies pile up faster than you can write them.

- ✗ Leads and client threads wait in your inbox or saved folder.
- ✗ Starting each reply from scratch eats the hour you needed for client work.
- ✗ Copy from ChatGPT still means paste, fix tone, and send one at a time.

Solution 3: Bulk Email Workflow

Three steps from inbox to sent replies.

- ✓ 1 · Import: Messages queued for drafting
- ✓ 2 · Review Drafts: Edit any message before you approve
- ✓ 3 · Send: Send from Microsoft 365

Batch draft replies, approve once, send from your inbox.

Demo 3: Bulk Email

Live on the platform · About 2 minutes · Full plan and above

- ✓ Open Bulk Email Processor
- ✓ Upload saved emails or sync inbox, review AI drafts
- ✓ Approve the batch and send.



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Clear the Backlog · Faster Replies · Less Copy-Paste



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Common questions

Plain answers we give partners and office managers

Already using ChatGPT?

- ✓ Same workflow every time, not a blank chat each time
- ✓ Steps connect in one company workspace, not personal chats

Why another subscription?

- ✓ Our fee covers apps and workspace, not AI usage
- ✓ You pay your provider directly; 2-month pilot waives platform fee

We have QBO and tax prep software

- ✓ Keep those tools. We finish summaries and client email
- ✓ Paste our drafts into your prep workflow as you do today

Which plan fits us?

- ✓ Starter: Setup admin + up to 2 app users
- ✓ Growth: up to 5 users · Full unlocks Bulk Email Processor



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Plans and Founding Rates

Free 2-month pilot · Founding rates for our first 50 customers

Plan	Regular	Founding	Team
Starter (Basic)	\$39	\$29	Admin + up to 2 app users
Growth (Standard)	\$59	\$49	Up to 5 app users
Full (Elite)	\$119	\$99	Up to 10 · Bulk Email Processor included
Enterprise	From \$199	From \$149	Up to 25 · contact us

AI usage is billed by your provider, not included in the platform fee.
Yearly billing saves one month · See ez4youtech.com/pricing

Try free for 2 months

- ✓ Platform fee waived on Starter, Growth, or Full
- ✓ We help your admin connect AI once
- ✓ Run all three live demos on real work
- ✓ Founding rates lock for early adopters



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AI MADE EASY FOR YOUR BUSINESS

Why trust EZ4YouTech.com

Built by a cloud developer and architect for small business teams

Founder credibility

25+ years in development, Architecture and DevSecOps, now for SMB.

Your data stays yours

Your AI accounts, your rules.
We do not resell prompts.

Real apps, not chat

Clear steps each day.
Tap Continue to open the next app.

Start small

Try free first, then add users and apps when you are ready.

Mohd Naeem, Founder & CEO | EZ4YouTech.com LLC | Frisco, TX | USA production platform live May 2026



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AI Platform Technology Stack

For Technical Audience · USA production posture · May 2026

Layer	Technology	Role
Edge and TLS	HTTPS	ez4youtech.com and aiplatformusa.ez4youtech.com
Application	FastAPI + Streamlit	REST API and agent or admin UI
Compute	Azure Container Apps	Health checks and tagged releases
Secrets	Azure Key Vault	JWT, encryption keys, Mongo URI
Database	MongoDB Atlas (M10)	Tenants and encrypted BYOS credentials
Storage	Azure Blob	tenant_id/ paths for documents
Email	AWS SES · Turnstile	Contact form delivery and CAPTCHA
AI routing	BYOS multi-provider	OpenAI, Together, Groq, xAI, and more

Enterprise-ready architecture. No SOC 2, ISO 27001, or HIPAA claims unless agreed in writing. Shared multi-tenant SaaS with logical isolation per tenant_id.

Full detail: ez4youtech.com/security.html#technology-stack



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Your next step

Book a walkthrough or try the platform on your next client file

1

Book a 30-minute demo

ez4youtech.com/contact
or call us

2

Try it free

2-month pilot; we help
with setup

3

Run your next summary

Summarize client
documents on the
platform

4

Run it on real work

Summary, client letter,
email with Continue

30-minute demo · 2-month free pilot · connect@ez4youtech.com · +1 (214) 404-2319

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Q & A

Quick answers, then your questions

How is this different from ChatGPT?

- ✓ Same workflow every time. Steps connect with Continue. Work stays in your company workspace.

Do you replace our existing software?

- ✓ No. We augment your tax prep, QBO, and client portals.

What about client reminders and bulk email?

- ✓ Client Relationship Reminders and Bulk Email Processor are on the platform today, on higher plans. We demo both live.

What does it cost after the free trial?

- ✓ Platform fee from \$29–\$99/mo founding rates; AI usage is billed by your provider separately.

Which plan fits a small team?

- ✓ Starter: Setup admin + up to 2 app users. Growth: up to 5. Full adds Bulk Email Processor for larger teams.

Is my client data safe?

- ✓ Your AI accounts and rules stay yours. We do not resell prompts. Your admin connects providers once.

How long does setup take?

- ✓ About 15 minutes for admin to connect AI once; staff can run a document workflow the same day.

Still have questions? Ask us anything: connect@ez4youtech.com or book a 30-minute demo.



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Thank you

AI made easy for your business. Try free for 2 months.

Scan to book a demo or open the platform

Book a Demo



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