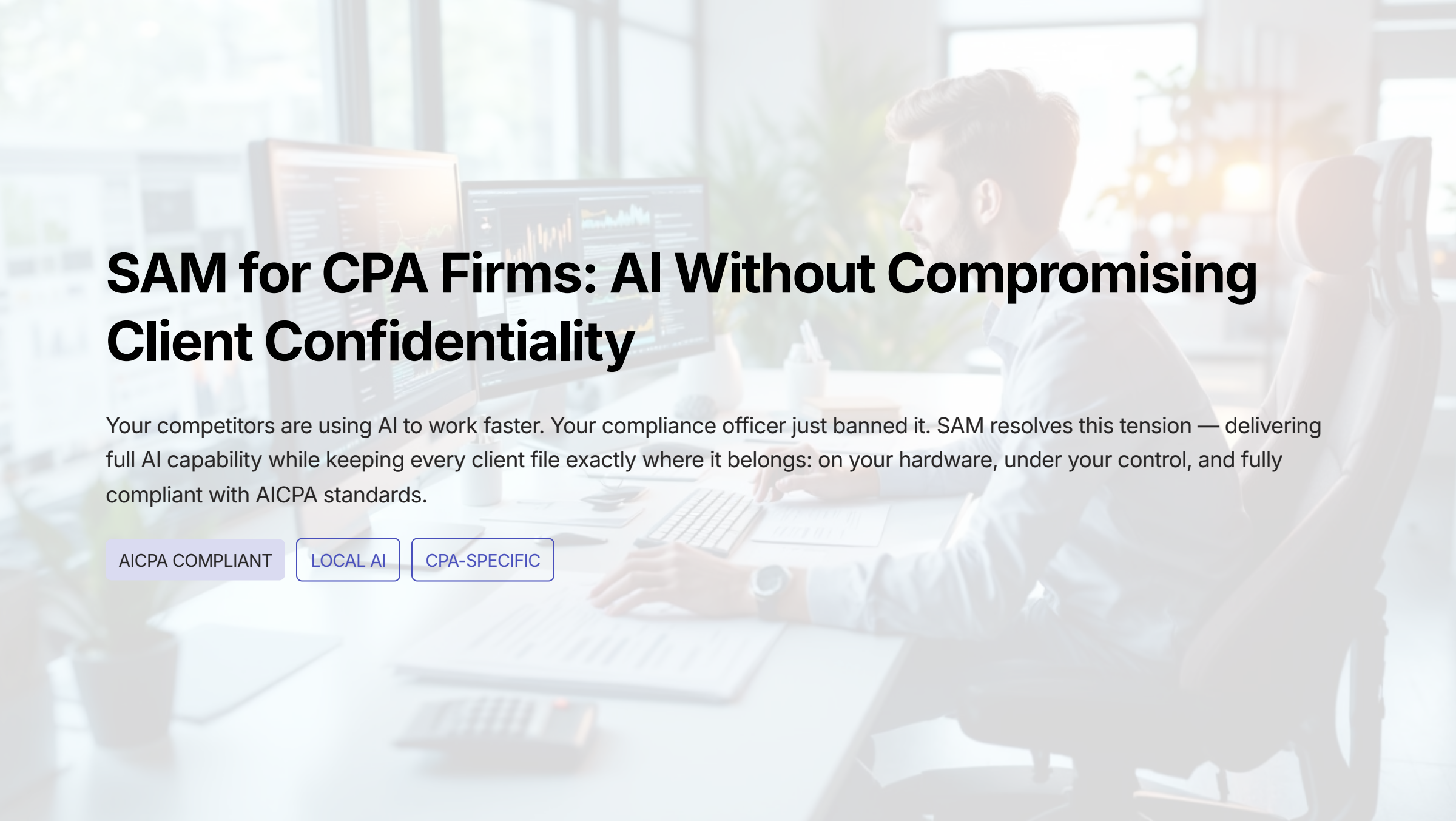


A man with a beard is sitting at a desk in a modern office, working on two computer monitors. The monitors display financial data and charts. The office has large windows in the background, letting in natural light. The overall scene is professional and focused on technology and finance.

SAM for CPA Firms: AI Without Compromising Client Confidentiality

Your competitors are using AI to work faster. Your compliance officer just banned it. SAM resolves this tension — delivering full AI capability while keeping every client file exactly where it belongs: on your hardware, under your control, and fully compliant with AICPA standards.

AICPA COMPLIANT

LOCAL AI

CPA-SPECIFIC

The Problem Your Firm Faces

"No ChatGPT. No Claude. No cloud AI. Any employee violating this risks termination."

This isn't paranoia — it's liability management. The regulatory exposure is real and immediate:

AICPA Code § 1.700.001

Requires strict confidentiality of client tax returns and financial data. A single breach can trigger license review.

Peer Review Audits

Auditors now specifically check whether firms used unapproved AI. Malpractice insurance explicitly excludes cloud AI losses.

Client Contracts

Most engagement letters explicitly forbid uploading client data to third-party servers — including AI platforms.

What You Want

AI to accelerate tax prep, financial analysis, and compliance workflows — just like every other industry.

The Catch

Cloud AI requires uploading returns and financials to third-party servers. So you ban AI entirely — while competitors in less-regulated industries race ahead.

Why Cloud AI Violates AICPA Standards

When you upload a client tax return to ChatGPT, you trigger a chain of liability that no good intentions can reverse.

1

You Upload

SSNs, income, deductions sent to OpenAI servers

2

OpenAI Trains

Their terms allow model training on submitted data

3

Breach Occurs

Your firm is liable — not OpenAI

4

You're Exposed

No E&O coverage. License under review.

AICPA Says

"You had a duty to keep that data confidential. You broke that duty when you sent it to OpenAI."

Your Carrier Says

"We explicitly excluded AI-related claims. You're not covered for this loss."

Your State Board Says

"You violated Code § 1.700.001. License under review — regardless of your intentions."

⊗ Cloud AI = you lost control of the data. Regulators don't care about good intentions — they care about control.

How SAM Keeps Data Local

SAM is purpose-built for accountants who need AI capability without sacrificing compliance. Every architectural decision prioritizes keeping your client data exactly where it belongs.



Local Storage, Local Processing

Client tax returns and financials live in secure OneDrive folders synced to a Mac mini in your office. SAM reads them locally — like a smart junior accountant reviewing the file — with **zero API calls to external servers.**



Free Local AI for Routine Work

Tax planning analysis, schedule summaries, and compliance checklists run on local AI models (Gemma 2, Qwen, DeepSeek) entirely on your Mac mini. Functionally free — no per-task cost, no cloud dependency.



Safe Cloud AI for Complex Work

For aggressive tax strategies or multi-entity planning, SAM extracts **only the question or summary** — never the raw return — and sends that to cloud AI for reasoning. Full audit trail included for Peer Review.

- ✓ Your state board sees: "This firm used AI, and their data control was flawless." Hardware attestation and Watchdog/Birddog logs prove it — every access, every action, documented.

Cost Advantage & Next Steps

The Numbers: 10-Person Firm

\$20K

Avg. Cloud AI Cost

ChatGPT Pro + API calls annually for 10 users

\$5K

SAM Annual Cost

Entire firm license + minimal cloud AI usage

\$65K

3-Year Savings

Cumulative savings after hardware investment

No vendor lock-in. No per-seat fees. No surprise bills. You own the system.

Get Started in 5 Steps

01

Workflow Assessment

Tax prep, planning & compliance review

02

Deploy in 2 Days

Mac mini + your secure OneDrive setup

03

Peer Review Docs

AICPA compliance proof provided

04

2-Hour Training

Your whole team, up and running

05

See the Gains

Efficiency wins visible in month one

"Our firm uses AI responsibly. We keep your data secure. See our audit trail." — Your competitive differentiator in a market full of 'no AI' firms.



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