Agentic AI for CPAs:
Automate Workflows with Intelligence

Presented By
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Learning Objectives

- Identify opportunities to deploy AI agents in your firm or business
- Distinguish between generative AI and agentic AI
- Apply agentic AI to automate your workflows

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Strategic Technology Advisor

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- Nationally recognized thought leader, advisor, author and speaker on CPA technology
- Strategic technology advisor to the profession w/ 35+ years of experience
- Founded and sold two CPA technology advisory startups
- Former National Mid-market Technology Partner - BDO
- CPA Practice advisor Top 25 Thought Leader for the CPA profession
- AICPA Business & Industry Hall of Fame Inductee
- Past Chair of the Michigan Association of CPAs
- Passionate advocate for the CPA profession!

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Presentation Outline

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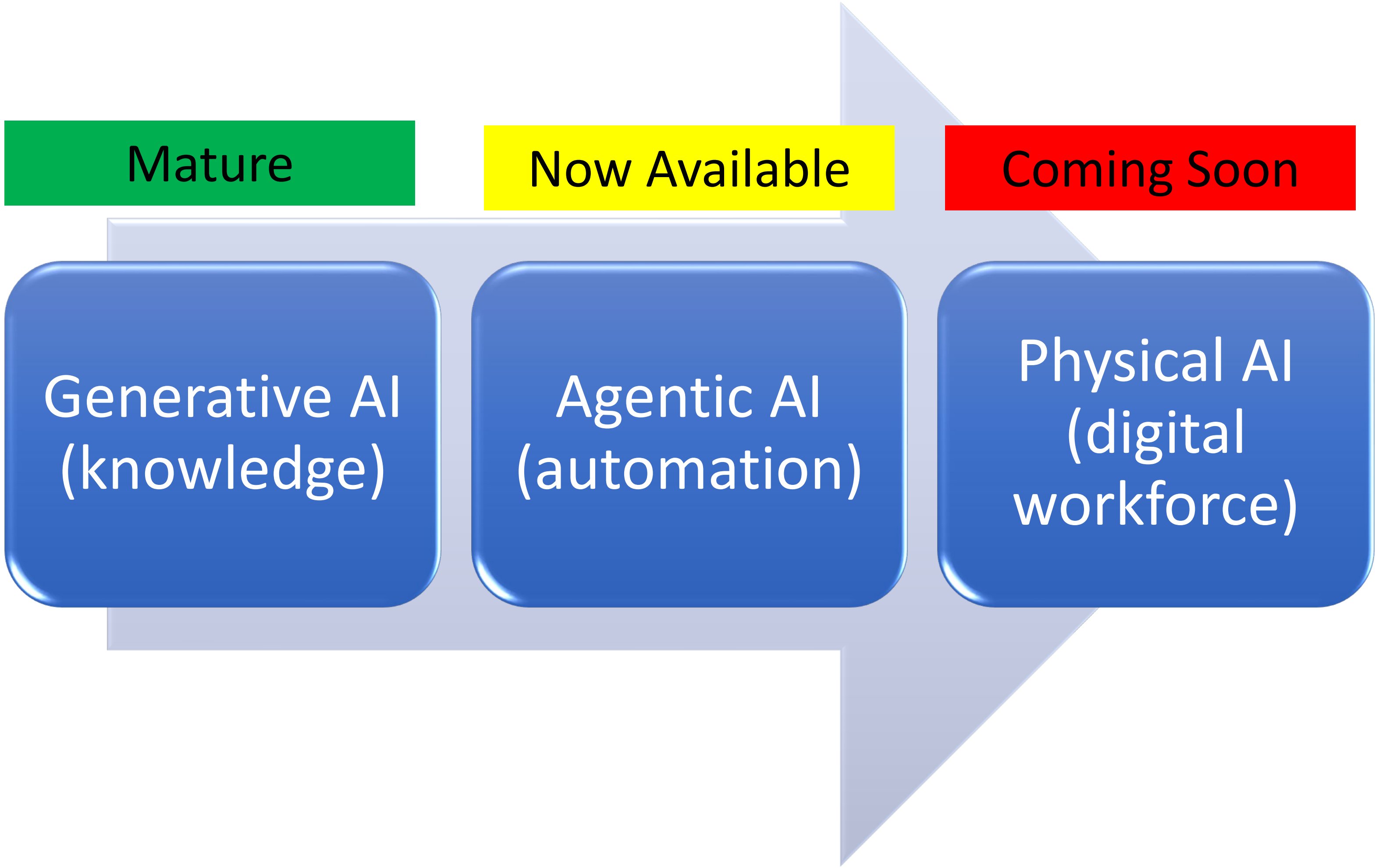
AGENTIC AI KEY CONCEPTS

AI Technology Evolution



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What is Agentic AI?

Agentic AI is an artificial intelligence system that can accomplish a specific goal with limited supervision. It consists of AI agents—machine learning models that mimic human decision-making to solve problems in real time. In a multiagent system, each agent performs a specific subtask required to reach the goal and their efforts are coordinated through AI orchestration.

Source: Cole Stryker, IBM Corporation

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Agentic AI

=

Autonomous AI

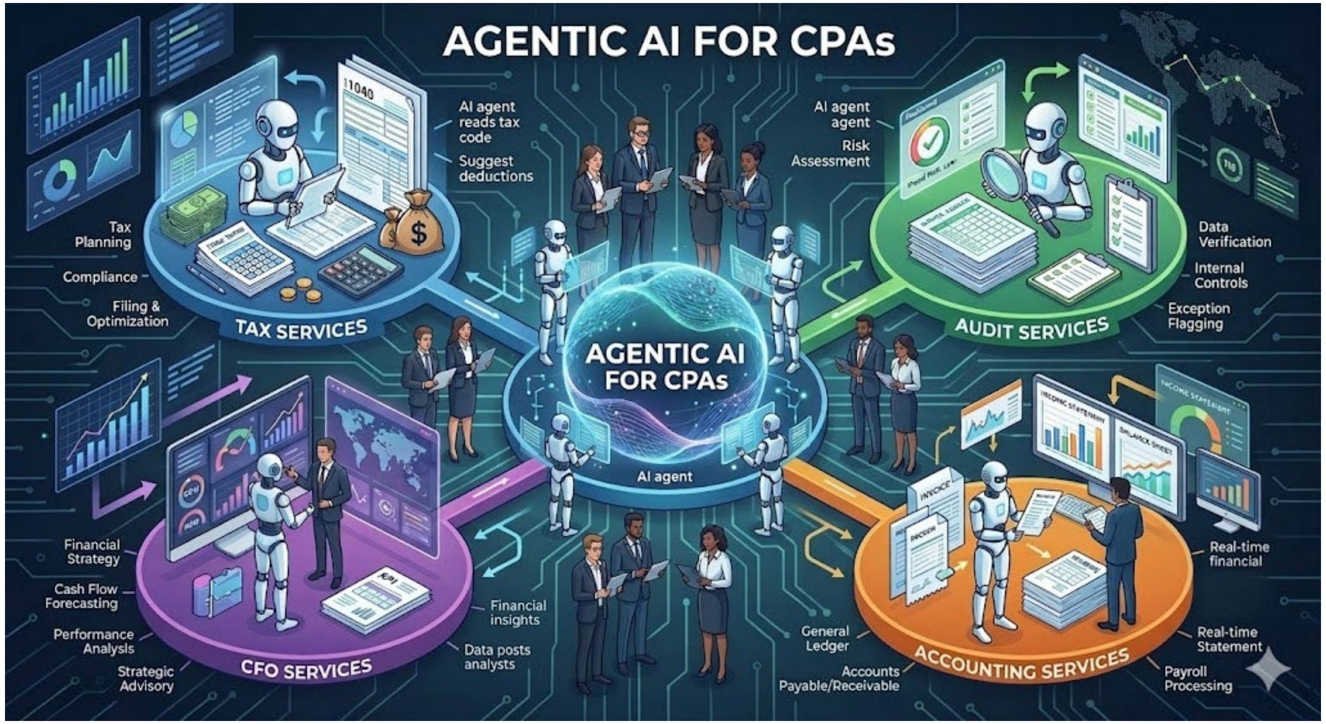
Agent AI Key Concepts

- AI Agents can be designed to act autonomously
- Designed to work towards achieving goals
- Develop a task-based plan to achieve the goal(s)
- Interact with external systems via APIs
- Adapt to new information while processing
- Utilize pre-built “skills” to execute specific tasks

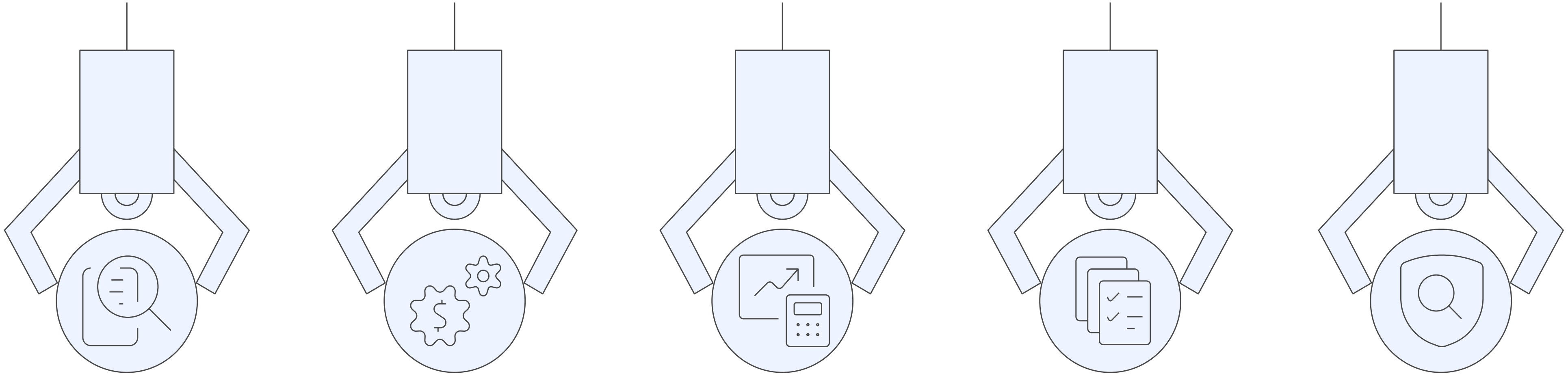
Example AI Agent Goals

- Setup a meeting with my team for tomorrow
- Identify and retrieve tax documents from client
- Book me a flight to San Francisco
- Draft the footnotes for the audit report
- Develop a financial plan for this couple

PRACTICAL APPLICATIONS FOR CPAS



Agentic AI Applications in <u>**Tax**</u> Services



Tax Legislation Monitoring

Agent monitors changes in tax laws. It keeps clients informed of new regulations.

Tax Strategy Creator

Agent creates personalized tax strategies for clients. It considers their financial situation and goals.

Tax Estimate Optimization

Agent dynamically optimizes tax estimates. It adjusts based on changing financial data.

Document Intake

Agent handles 1040 document intake and organization. It streamlines the tax preparation process.

Audit Defense

Agent prepares audit defense packages for clients. It ensures they are well-prepared for audits.

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Agentic AI Applications in Accounting Services

Transaction Classification

Agent categorizes financial transactions for better organization.

Bank Reconciliation

Agent matches bank statements with company records.

Expense Report Approval

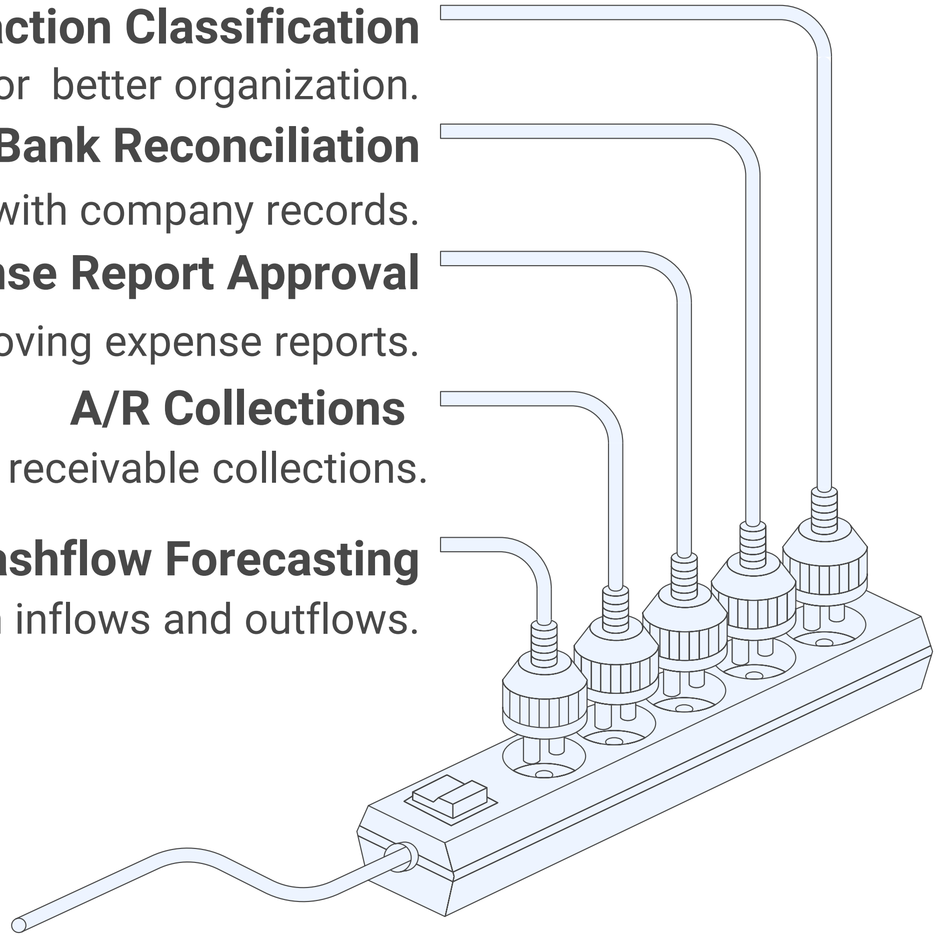
Agent streamlines the process of approving expense reports.

A/R Collections

Agent automates and optimizes accounts receivable collections.

Cashflow Forecasting

Agent predicts future cash inflows and outflows.



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Agentic AI Applications in **Audit** Services

Risk Assessment

Identify high risk accounts for audit focus.

Fraud Detection

Detect anomalies and suspicious patterns indicative of fraud.

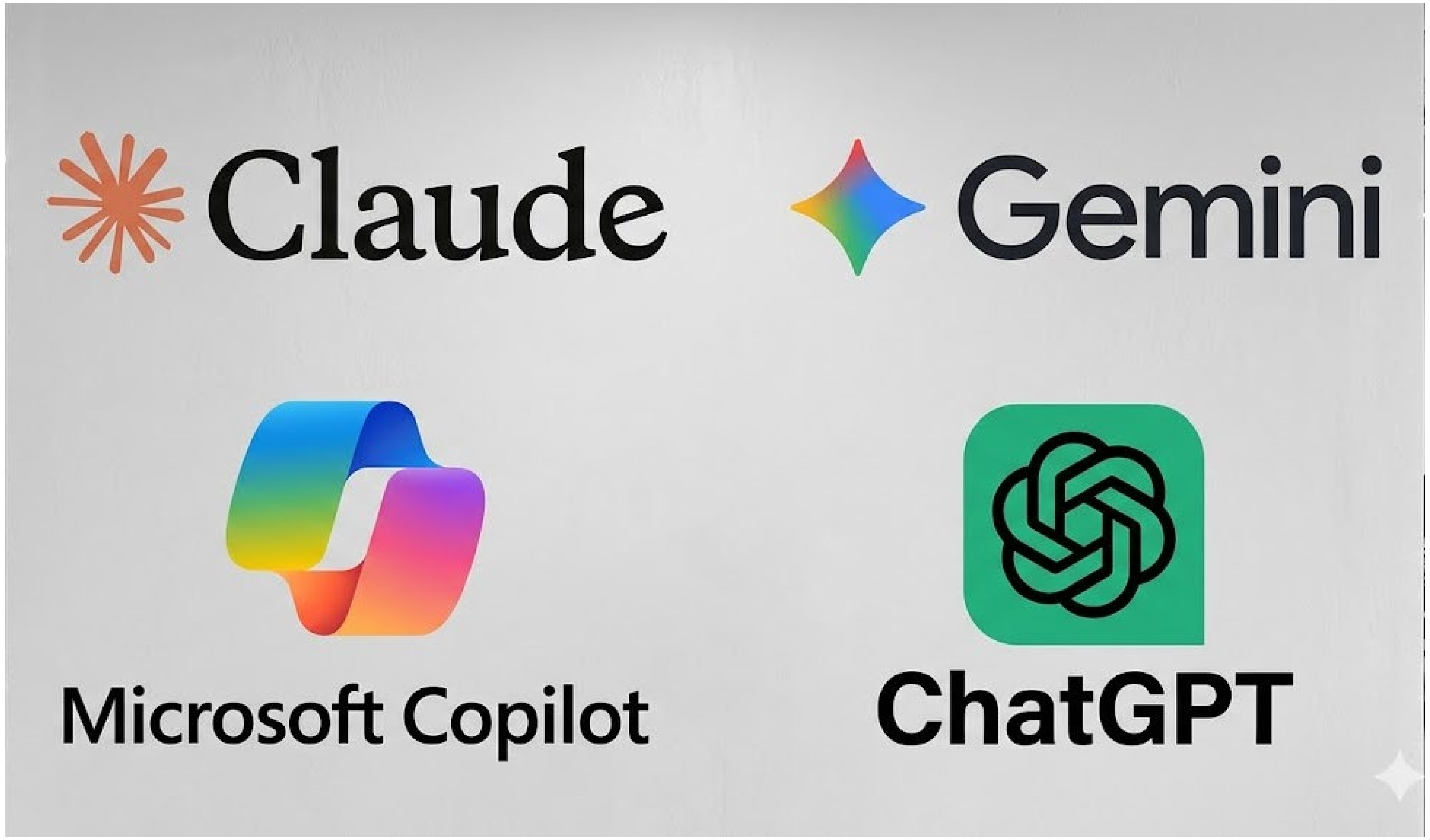
Workpaper Generation

Automate the creation of audit workpapers.

Financial Reporting

Generate board financial reporting packages efficiently.

AGENTIC AI TOOLS



Agentic AI Tool Selection Considerations

- Start with your preferred generative AI solution
- Focus on integration with your core software applications
- No code / low code / developer platforms
- Security, governance and transparency features
- Pricing model – subscription vs. usage vs. hybrid
- Compatibility with internal skill set

Top Selling All Purpose Agentic AI Tools

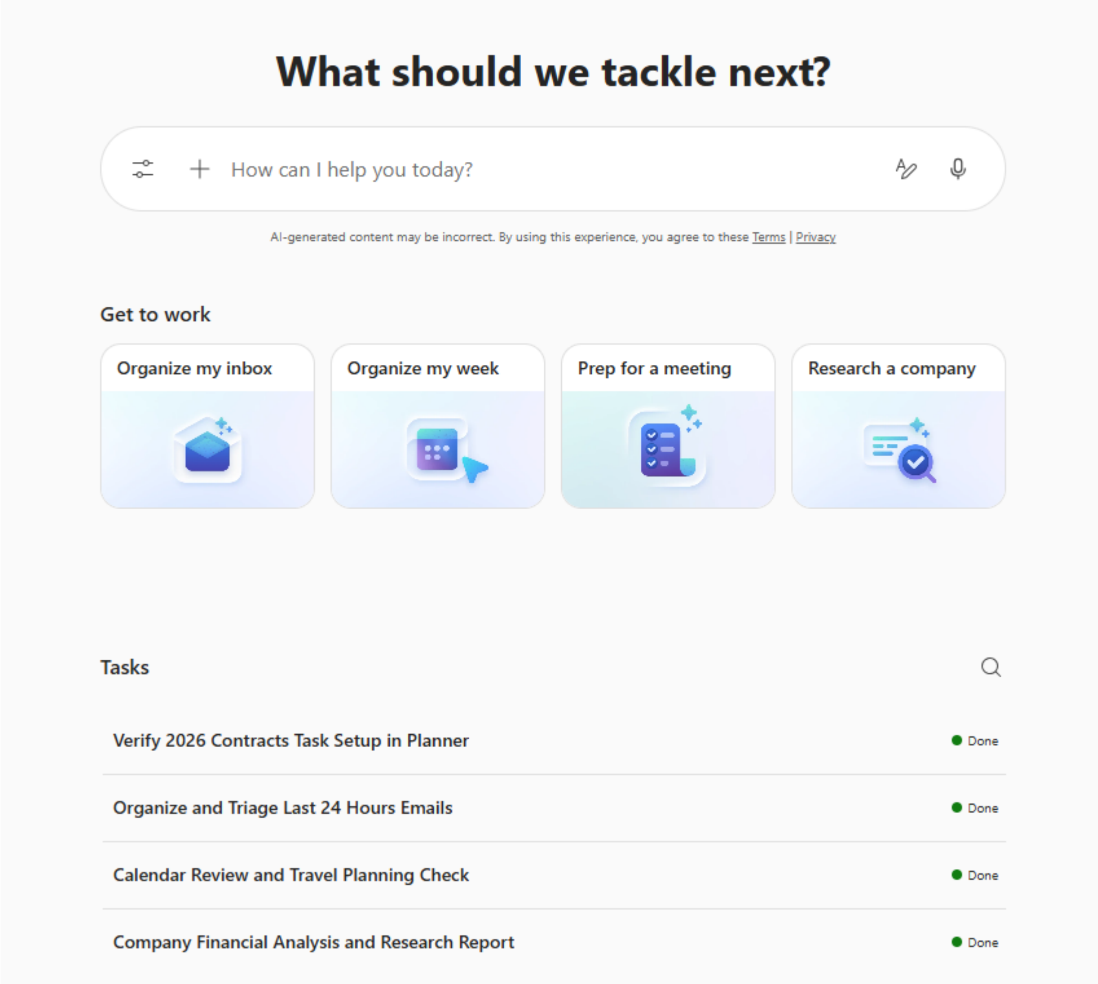
- Anthropic Claude Co-work / Claude Code (Enterprise focus)
- Microsoft Copilot (Microsoft 365 centric) – Studio / Cowork
- Google Gemini (Google apps centric)
- ChatGPT (Market share)

BUILDING AND DEPLOYING AN AI AGENT

Agentic AI Demos with Microsoft Copilot Cowork

- Organize my inbox
- Research a company
- Travel flight booking confirmation
- Contract / engagement manager reconciliation

Microsoft Copilot Cowork (Built on Anthropic Claude's Cowork)



Things to Know About Copilot Cowork

- AI Agent builder bhosted in the cloud
- Based on licensed Anthropic Claude Cowork technology
- Embedded and extended inside Microsoft 365 ecosystem
- Enforces Microsoft 365 enterprise security, compliance and audit controls
- Requires Microsoft 365 Copilot license

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Organize My Inbox - Prompt

Help me organize my inbox. Please review my email from Outlook.

First, review my inbox from the last 24 hours and show me a summary:

- Total number of emails and a rough breakdown
- Any emails from my manager or my management chain
- Any urgent emails – look at the subject, contents, and if it is marked as high importance

Let's do a basic triage of each email. Ask me before making any changes.

- If spam, let's delete the email.
- If not important to me, like a broad email update, let's provide a synopsis and archive it.
- If a meeting invite, let's accept, decline, or mark as tentative.
- If requiring a reply, let's draft a reply and save it as a draft.
- If urgent, let's draft a reply together. Let's even SEND the reply!

Start with the easiest changes first. Once I approve each change, take the action directly in my inbox one at a time.

After we complete the last 24 hours, let's offer to review the last few days (or weeks) of emails.

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Organize My Inbox - Output

Inbox — Last 24 Hours: 24 Emails

Breakdown: Newsletters (8) · Speaking/Events (5) · Action Required (4) · Marketing (4) · Travel (1) · Transactional (2)

No management chain — you're the principal at Higgins Advisory LLC.

Urgent Items (3)

1. **Presentation PDF due April 23** — Douglas Relyea / Lynn Eyre want your slides for the April 29 Neighborhood Club event in Grosse Pointe.
2. **OSCPA Speaker slides due April 13** (Monday!) — Travis Chesney needs your forms and slides for the April 22 Not-for-Profit Conference in Portland, OR. Travis is OOO; urgent contact is profdev@orcpa.org.
3. **Bob Lewis — podcast booking** — Wants to connect this week (before Friday) to book a recording session.

Also: your **AICPA Cybersecurity webcast is tomorrow (April 9 at 1:00 PM EDT)** — no reply needed, just a heads up.

Triage Plan — Please Approve

I've grouped everything by action type, easiest first:

Step	Action	Count
Step 1	Delete (spam/promos)	3 emails
Step 2	Archive with synopsis (newsletters/broad updates)	12 emails
Step 3	Archive/no action (transactional)	5 emails
Step 4	Draft reply & save as draft	1 email (Bob Lewis)
Step 5	Draft + **SEND** (urgent)	2 emails

How would you like to proceed? You can:

- Say **"yes to all"** and I'll work through each step, showing drafts before sending
- Approve by step number (e.g., "do steps 1–3, then show me the drafts")
- Give feedback on any specific email above

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Research a Company - Prompt

Help me analyze a company. If I do not provide one, ask me which one (and make a few suggestions, e.g. Microsoft (MSFT)).

Use web search to gather the most current information available, including recent earnings reports, SEC filings, analyst commentary, and relevant news. Do an exhaustive search, and be sure to place extra emphasis on the official financial data (and not news or editorialization). This is not financial advice, but just to help people understand a company.

Take the findings and create three things –

A short executive summary, you share in the chat

3 paragraphs covering the company, its performance, and key financial highlights

Use a concise, analyst-style, tone

A 2 page word document that is a cover sheet of the research

Page 1 – company overview (name, ticker, sector, market cap, current price, 52-week range)

Page 2 – recent developments (last 1-2 quarters of earnings, guidance updates, M&A activity), a summary of bull/bear arguments, and a table of key financial metrics

A thorough spreadsheet with the financials. All tabs should include clear labels, source notes, and consistent formatting.

Tab 1 — Income Statement: Last 3–5 years of annual data plus most recent quarterly results (revenue, COGS, gross profit, operating expenses, EBIT, net income, EPS)

Tab 2 — Balance Sheet: Total assets, liabilities, equity, cash & equivalents, total debt, net debt

Tab 3 — Cash Flow Statement: Operating cash flow, capex, free cash flow, dividends, share repurchases

Tab 4 — Key Ratios & Metrics: Gross margin, operating margin, net margin, ROE, ROA, debt/equity, current ratio, EV/EBITDA, P/E, FCF yield

Tab 5 — Valuation Snapshot: Current vs. 5-year average multiples, peer comparison if data is available

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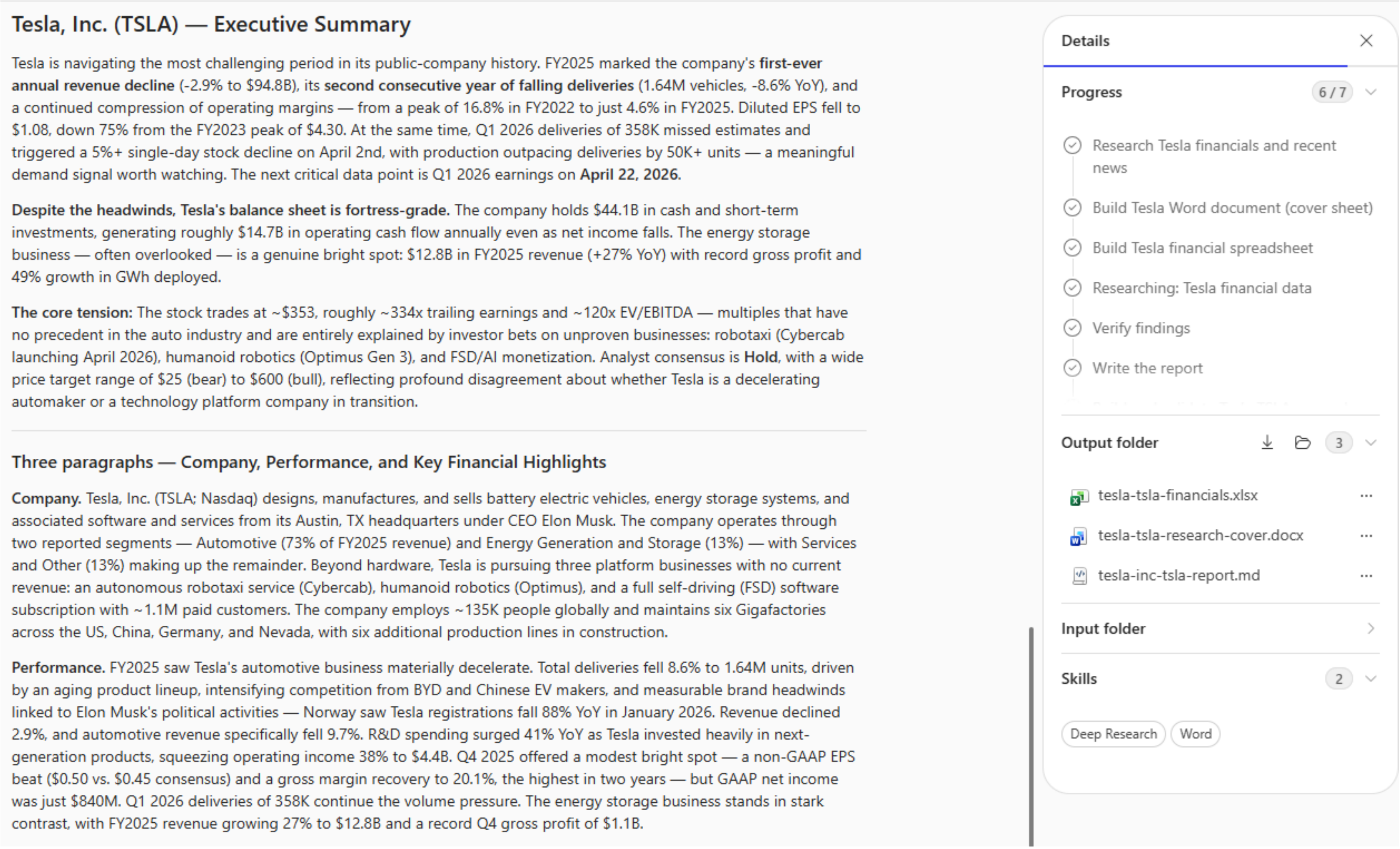
Research a Company - Output



Tesla, Inc. (TSLA) — Executive Summary

Tesla is navigating the most challenging period in its public-company history. FY2025 marked the company's **first-ever annual revenue decline** (-2.9% to $94.8B), its **second consecutive year of falling deliveries** (1.64M vehicles, -8.6% YoY), and a continued compression of operating margins — from a peak of 16.8% in FY2022 to just 4.6% in FY2025. Diluted EPS fell to $1.08, down 75% from the FY2023 peak of $4.30. At the same time, Q1 2026 deliveries of 358K missed estimates and triggered a 5%+ single-day stock decline on April 2nd, with production outpacing deliveries by 50K+ units — a meaningful demand signal worth watching. The next critical data point is Q1 2026 earnings on **April 22, 2026.**

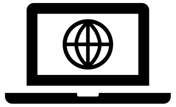
Despite the headwinds, Tesla's balance sheet is fortress-grade. The company holds $44.1B in cash and short-term investments, generating roughly $14.7B in operating cash flow annually even as net income falls. The energy storage business — often overlooked — is a genuine bright spot: $12.8B in FY2025 revenue (+27% YoY) with record gross profit and 49% growth in GWh deployed.

The core tension: The stock trades at ~$353, roughly ~334x trailing earnings and ~120x EV/EBITDA — multiples that have no precedent in the auto industry and are entirely explained by investor bets on unproven businesses: robotaxi (Cybercab launching April 2026), humanoid robotics (Optimus Gen 3), and FSD/AI monetization. Analyst consensus is **Hold**, with a wide price target range of $25 (bear) to $600 (bull), reflecting profound disagreement about whether Tesla is a decelerating automaker or a technology platform company in transition.

Three paragraphs — Company, Performance, and Key Financial Highlights

Company. Tesla, Inc. (TSLA; Nasdaq) designs, manufactures, and sells battery electric vehicles, energy storage systems, and associated software and services from its Austin, TX headquarters under CEO Elon Musk. The company operates through two reported segments — Automotive (73% of FY2025 revenue) and Energy Generation and Storage (13%) — with Services and Other (13%) making up the remainder. Beyond hardware, Tesla is pursuing three platform businesses with no current revenue: an autonomous robotaxi service (Cybercab), humanoid robotics (Optimus), and a full self-driving (FSD) software subscription with ~1.1M paid customers. The company employs ~135K people globally and maintains six Gigafactories across the US, China, Germany, and Nevada, with six additional production lines in construction.

Performance. FY2025 saw Tesla's automotive business materially decelerate. Total deliveries fell 8.6% to 1.64M units, driven by an aging product lineup, intensifying competition from BYD and Chinese EV makers, and measurable brand headwinds linked to Elon Musk's political activities — Norway saw Tesla registrations fall 88% YoY in January 2026. Revenue declined 2.9%, and automotive revenue specifically fell 9.7%. R&D spending surged 41% YoY as Tesla invested heavily in next-generation products, squeezing operating income 38% to $4.4B. Q4 2025 offered a modest bright spot — a non-GAAP EPS beat ($0.50 vs. $0.45 consensus) and a gross margin recovery to 20.1%, the highest in two years — but GAAP net income was just $840M. Q1 2026 deliveries of 358K continue the volume pressure. The energy storage business stands in stark contrast, with FY2025 revenue growing 27% to $12.8B and a record Q4 gross profit of $1.1B.



Output Files

Travel Flight Booking Prompt / Output

Review my calendar for the next 60 days and identify out of town projects based on the appointment location and compare against my Delta Receipts folder location to confirm I have booked a flight.

Thought process

Now pulling your calendar and Delta receipts in parallel.

I'm ready to help summarize tool outcomes. Please provide me with information about what the ToolSearch accomplished, and I'll create a concise 1-sentence summary focused on the user-relevant result.

Good — calendar is loaded. Now let me find the Delta Receipts folder and check for flight confirmations.

Dispatched in 1.2 minutes

Here's your full travel review for the next 60 days, John:

Out-of-Town Trips — Flight Status

Trip	Dates	Location	Flight Booked?
ORCPA NFP Conference	Apr 21–22	Portland, OR	✅ Yes
Illinois CPA Society	May 6–7	Champaign, IL	✅ Yes
Accounting Ignited – MNCPA	May 12–13	Bloomington, MN	✅ Yes
IACPA Financial Institutions Conf.	**May 27–28**	**West Des Moines, IA**	⚠️ **No flight found**

Confirmed Trips

Portland, OR — Apr 21–22 (**Travel to Portland [In-person]**, **ORCPA NFP Conference**) Outbound **Your Itinerary:DTW-PDX, HB48EU** and return **Your Itinerary:PDX-DTW, HCJHZ9** are both booked — confirmation numbers **HB48EU** (DTW→PDX) and **HCJHZ9** (PDX→DTW), matching receipts Your Flight Receipt - JOHN HENRY HIGGINS 21APR26 and Your Flight Receipt - JOHN HENRY HIGGINS 22APR26.

Champaign, IL — May 6–7 (**Illinois CPA Society**) Flights routed through Indianapolis — **Flight DL 5752Flight DL 4139 | DTW to IND** and **Flight DL 5752 | IND to DTW** are on the calendar. Receipt Your Flight Receipt - JOHN HENRY HIGGINS 06MAY26 confirms booking **GZPEMX** departing May 6.

Bloomington, MN — May 12–13 (**Tentative: Accounting Ignited - MNCPA**) Round trip **Your Itinerary:DTW-MSP, HJ9WUE** and **Your Itinerary:MSP-DTW, HJ9WUE** confirmed — confirmation number **HJ9WUE**, matching receipt Your Flight Receipt - JOHN HENRY HIGGINS 12MAY26.

Action Required

⚠️ **West Des Moines, IA — May 27–28** (**Tentative: IACPA Financial Institutions Conference**) Your calendar shows travel to the West Des Moines Marriott for the IACPA Financial Institutions Conference, but I found **no Delta flight receipt** for this trip. You'll want to book a flight — DTW→DSM (Des Moines) would be the likely route.

Details

Progress 3 / 3

- Scan calendar for out-of-town appointments
- Search Delta Receipts for flight confirmations
- Cross-reference trips against booked flights

Output folder

Input folder

Skills

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Contract / Engagement Manager Reconciliation – Prompt

Prompt:

Scan my SharePoint site Business Operations Contracts document folder and confirm that each contract in 2026 has a corresponding task setup in my Courseware Development plan in the Planner app

Contract / Engagement Manager Reconciliation - Output

- **17 contracts** have matching Planner tasks
- **2 contracts** need your attention — no tasks found at all [redacted])
- **2 contracts** have tasks that may need their names corrected ([redacted])

Would you like me to go ahead and create the missing Planner tasks for [redacted]?

Yes, please create the missing Planner tasks for [redacted]

Knocked out in 49.5 minutes

All 3 tasks are now live in your Courseware Development plan:

Task Created	Due Date
[redacted] **Wealth Management – AI Advisory**	Dec 31, 2026
260528 [redacted] **– CPE Event**	May 28, 2026
260918 [redacted] **– Fall CPE Event**	Sept 18, 2026

I used a Dec 31 placeholder for [redacted] since the contract doesn't specify an event date — you may want to update that once you know the delivery date. The [redacted] tasks match the dates on your signed contract. You'll also want to fill in the specific topic/session names once confirmed.

Thanks for setting these up. Can you add reminders for two weeks before each deadline?

Thought process

Planner doesn't support native reminders, so I'll create Outlook calendar reminders for two weeks before each deadline. Let me set all three up in parallel.

Creating **Reminder:** [redacted] **Wealth Management AI Advisory —...** Outlook

All three reminders are on your calendar:

Reminder	Date
ISCPA May 28 CPE Event	**May 14, 2026**
ISCPA Fall CPE Event (Sept 18)	**Sept 4, 2026**
Droms Strauss Wealth Management AI Advisory	**Dec 17, 2026**

Each is flagged as high importance and includes a note pointing you back to the Courseware Development plan to check that deliverables are on track. Is there anything else you'd like to do with these contracts?

Details

Progress 4 / 4

- Find the Business Operations SharePoint site and Contracts folder
- Retrieve tasks from the Courseware Development Planner plan
- Cross-reference contracts against Planner tasks and compile report
- Create missing Planner tasks for [redacted]

Output folder

Input folder

Skills

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AGENTIC AI GOVERNANCE & RISK MANAGEMENT

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Key Risks to Address

- Data privacy and confidentiality
- Accuracy and hallucination risk
- Autonomous task execution
- Reliance on third party software providers

Data Privacy and Confidentiality

- Potential breach of client confidentiality
- Unauthorized access and distribution of data
- Mitigation
  - ✓ Restrict data access to approved systems
  - ✓ Use enterprise solutions
  - ✓ Conduct an internal data access audit
  - ✓ Implement acceptable use policy for agentic AI

Accuracy and Hallucination Risk

- Potential for inaccurate output / results
- Errors can go undetected
- Mitigation
  - ✓ Implement quality control process for inputs & outputs
  - ✓ Thoroughly test the agent process / workflow
  - ✓ Review the “reasoning / processing” steps

Autonomous Task Execution Risk

- Agent execution without human intervention
- Risk increases with app integrations
- Mitigation
  - ✓ Incorporate “human in the loop” review checkpoints
  - ✓ Build validation checkpoints into the agent itself

Reliance on Third-Party AI Providers Risk

- AI tools are being rushed to market
- New tools have limited market validation
- Mitigation
  - ✓ Be thorough with vendor due diligence
  - ✓ Understand vendors' privacy policy
  - ✓ Monitor market feedback

AGENTIC AI DEPLOYMENT STRATEGY

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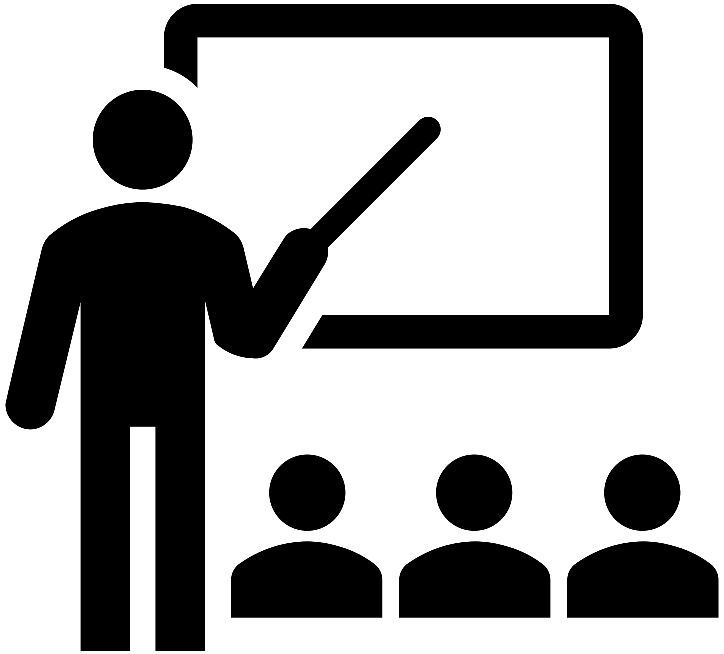
Agentic AI **Talent** Stack

- Get your team educated on generative and agentic AI
- Identify AI champions
- Create a firm / department wide AI application contest
- Build out pilot initiative(s) per core workflow
- Establish agentic AI responsible usage policy

Agentic AI **Tech** Stack

- Research and procure agentic AI tool(s)
- Conduct internal data access audit
- Determine scope of authorized integrations
- Configure and deploy AI tool(s)
- Provide technical training for staff

WRAP-UP



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2026 Higgins Advisory AI Curriculum

- The AI Revolution in 2026: What CPAs Should Know
  - AI 101 For CPAs: Core Concepts and Practical Applications
  - AI Hands-on Bootcamps
    - ChatGPT
    - Google Gemini
    - Microsoft Copilot
  - Agentic AI for CPAs: Automate Workflows with Intelligence
  - Ethical AI Practices for CPAs: Ensuring Responsible Use
  - Smarter Tax Services with AI Tools

Registration available where you registered for this presentation

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In Summary

- Agentic AI is a twin-engine jetpack for productivity
- This emerging technology has inherent risks, know your technical limits
- Agentic AI will get easier, safer and more powerful quarter by quarter
- Start with low-risk personal applications to get initiated

Thank you!!!

Let’s connect on LinkedIn

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