
Unlocking Efficiency With Your Documents

*From Manual Review to AI-Powered
Insight: Unlock Faster Insights Across
Every Document*

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Wolters Kluwer

Today you'll be
hearing from...



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Research & Advisory

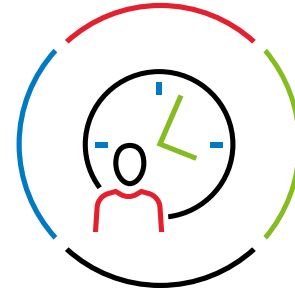
What We'll Cover

- The document challenge
- How CCH AnswerConnect Document Analysis solves it
- Key use cases
- Live demo
- Next steps

The Hidden Cost of Manual Document Review



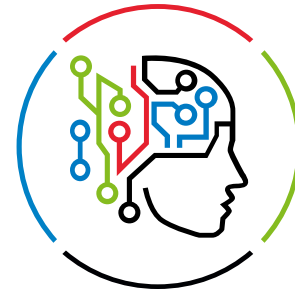
Increasing volume of documents



Time-intensive manual review



Inconsistent outputs across teams

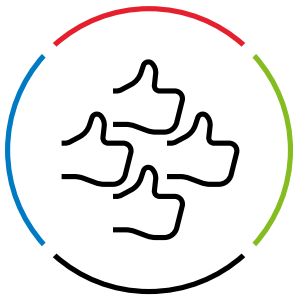


Difficulty scaling expertise

Is This Session For You?

For You

- ☐ Drowning in document volume?
- ☐ Losing hours to manual review or reconciliation?
- ☐ On the hook for accuracy in workpapers, returns, or audits?
- ☐ Want to reclaim capacity and speed up turnaround?



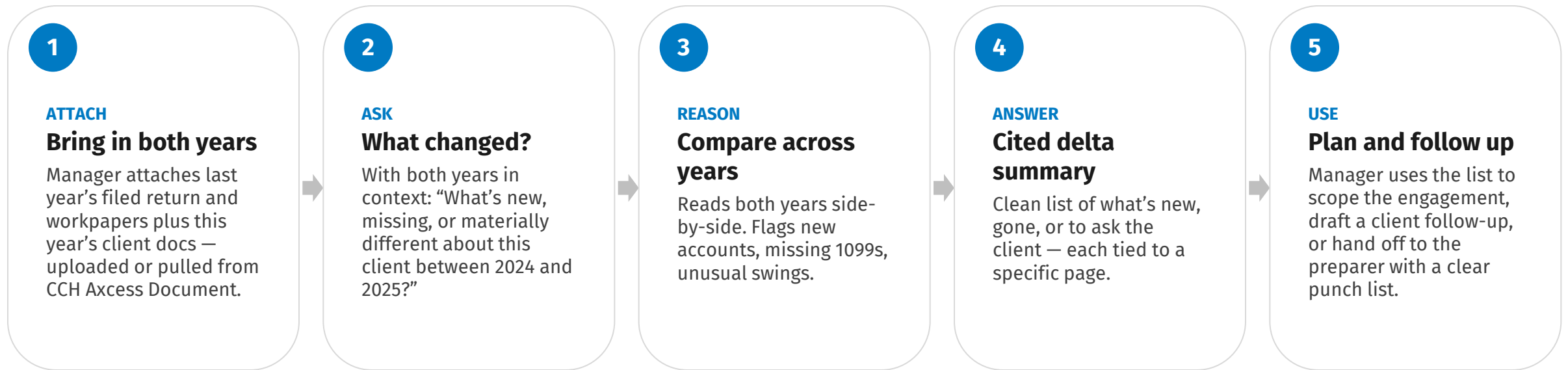
Not For You

- ☐ Happy with manual workflows
- ☐ Already fully automated review & reconciliation
- ☐ Just want a generic chatbot
- ☐ No need to scale expertise, consistency, or speed



Document Analysis: “what changed since last year?” for any client, in minutes

THE PAIN Every January, a manager reopens last year’s return and this year’s docs side-by-side, hunting for what’s new, missing, or different. Hours of compare-and-contrast, per client.

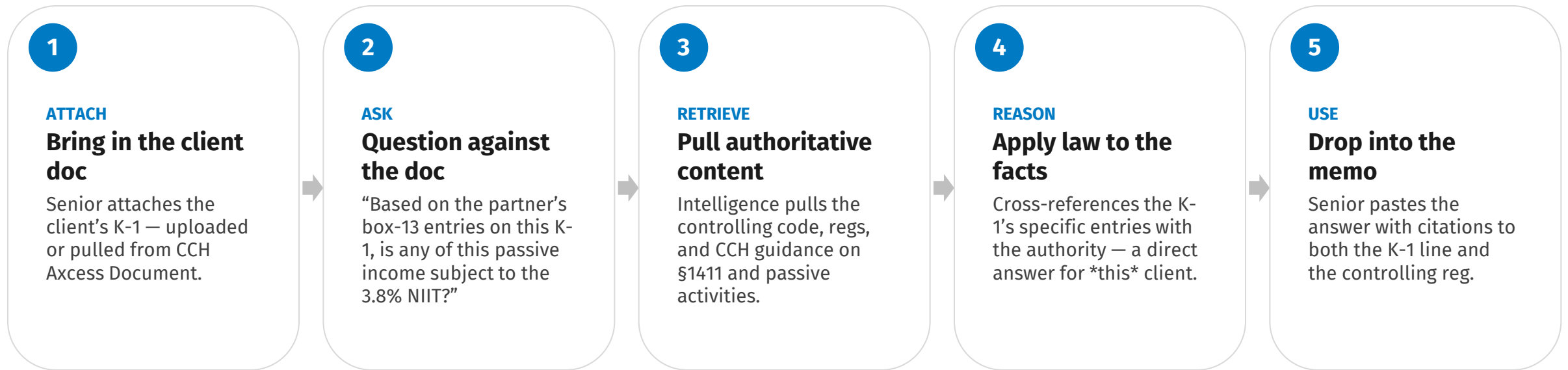


THE OUTCOME

Hours of side-by-side review → a 5-minute briefing — with citations, so nothing slips through and the reviewer can verify in one click.

Research: a cited answer that already accounts for this client's facts

THE PAIN Senior preparer hits a question mid-return. Researches it generically in one tab, then re-reads the client K-1 in another to figure out if the rule actually applies. Two contexts, manual cross-reference.

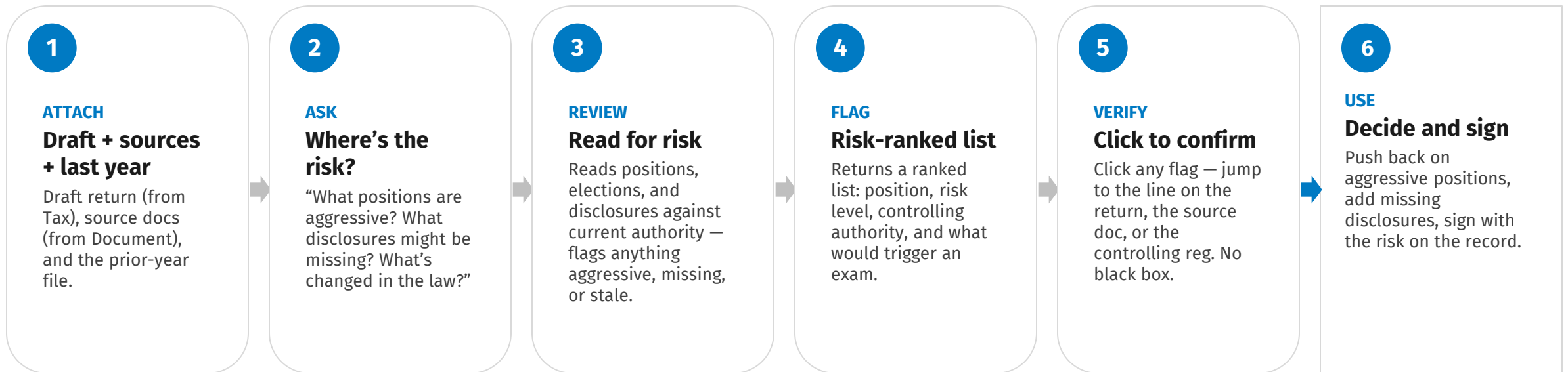


THE OUTCOME

Two-tab cross-reference → a single answer that already applies the law to this client’s facts — something a generic chatbot cannot do securely, accurately, and consistently.

Return Review: catch the risk — aggressive positions, missing disclosures, law changes — before you sign

THE PAIN The numbers tie out. The real risk is what the preparer chose not to flag — aggressive positions, missing disclosures, last year's memo a new ruling just invalidated. Partner signs anyway.



THE OUTCOME

Partners stop signing on faith. Aggressive positions get caught before the return goes out — not in an exam two years later.

See It In Action

*From document to
decision in minutes.*

- Real Documents.
- Real Insights.
- Real Outcomes.

Why It Matters

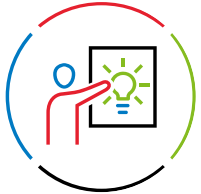
Impact - Outcomes



Reduce manual hours

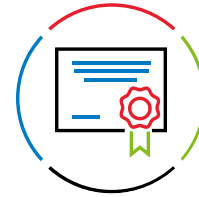


Improve turnaround time

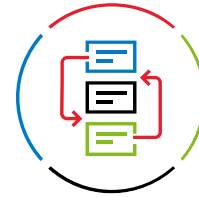


Enable higher-value work

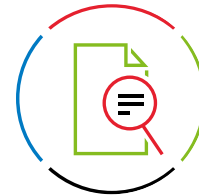
Why It's Different



Grounded in authoritative content



Built for real workflows



Defensible, traceable outputs

Is This Right For Me?



Statement	YES	NO
1 Our team spends more time reviewing documents than advising clients.	☐	☐
2 We struggle to consistently flag risks and changes across returns.	☐	☐
3 Scaling expertise feels impossible without hiring more staff.	☐	☐
4 Our workflows are not dynamic or responsive to new information.	☐	☐
5 Missed changes or oversights have led to rework.	☐	☐

What your score means

- 0

Keep exploring
Use the demo to identify a future workflow opportunity.
- 1-2

Targeted opportunity
Pick one process to improve first.
- 3+

Strong fit
Prioritize a working session or demo with real documents.

What is your score?

“If you checked YES to any item, you have a workflow where Document Analysis can help.”

Common Objections and Concerns

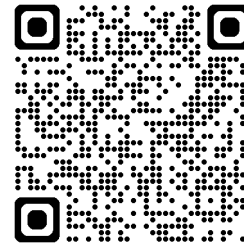
- Will this replace my team?
- Can we trust it with sensitive client documents?
- Is this just another generic AI tool?
- What about accuracy and defensibility?
- I don't think this will work for my firm's size.
- We don't have time to train on a new tool.

Ready to Transform Your Document Workflows?



Bring your documents. Get your answers

- Schedule a demo
- Start a trial
- Explore use cases with your team
- Claim your special association offer



Get Started

Scan the code

<https://engagetax.wolterskluwer.com/assocacstd>

Questions?

We'd love to hear from you—drop your questions in the chat.



Get Started

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Thank you

