



H I V E
TRUST. WORTHY. AI

HIVE AI Tax Assistant

Transforming the way CPAs and tax practitioners serve their clients' needs.

Transformation of Knowledge-Based Services

Today



Software Tools

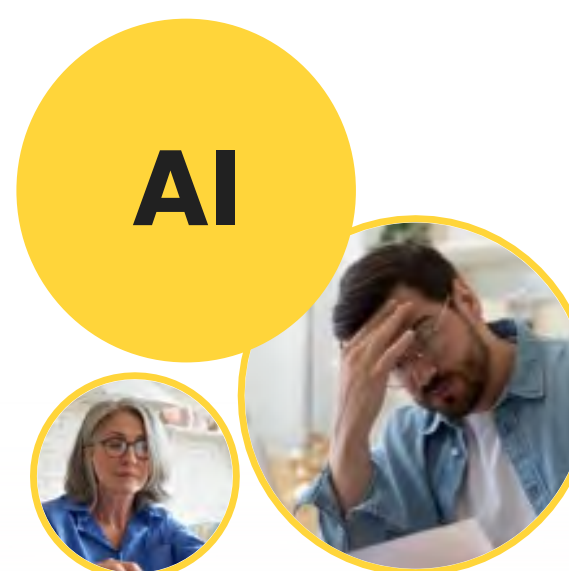
1-2 Years



AI Assistants

Model: B2B
Intelligent Tools
AI: Jr. Assoc.
Define & Train
Early Adopters

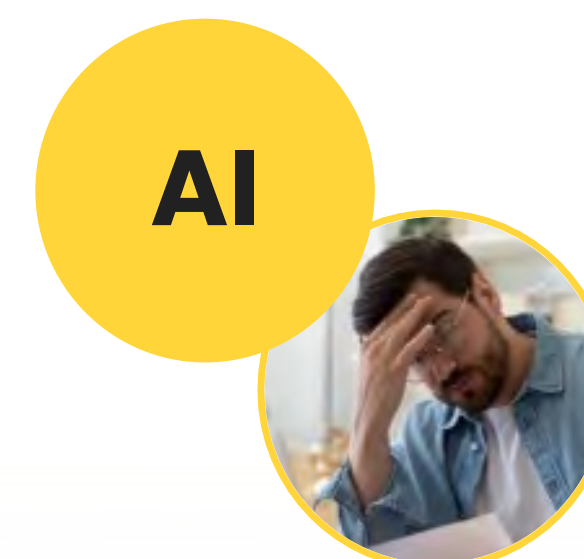
3-4 Years



Human in the Loop

Model: B2C
Amazon for Pro Services
AI: Domain Expert
Mature
Mass Market

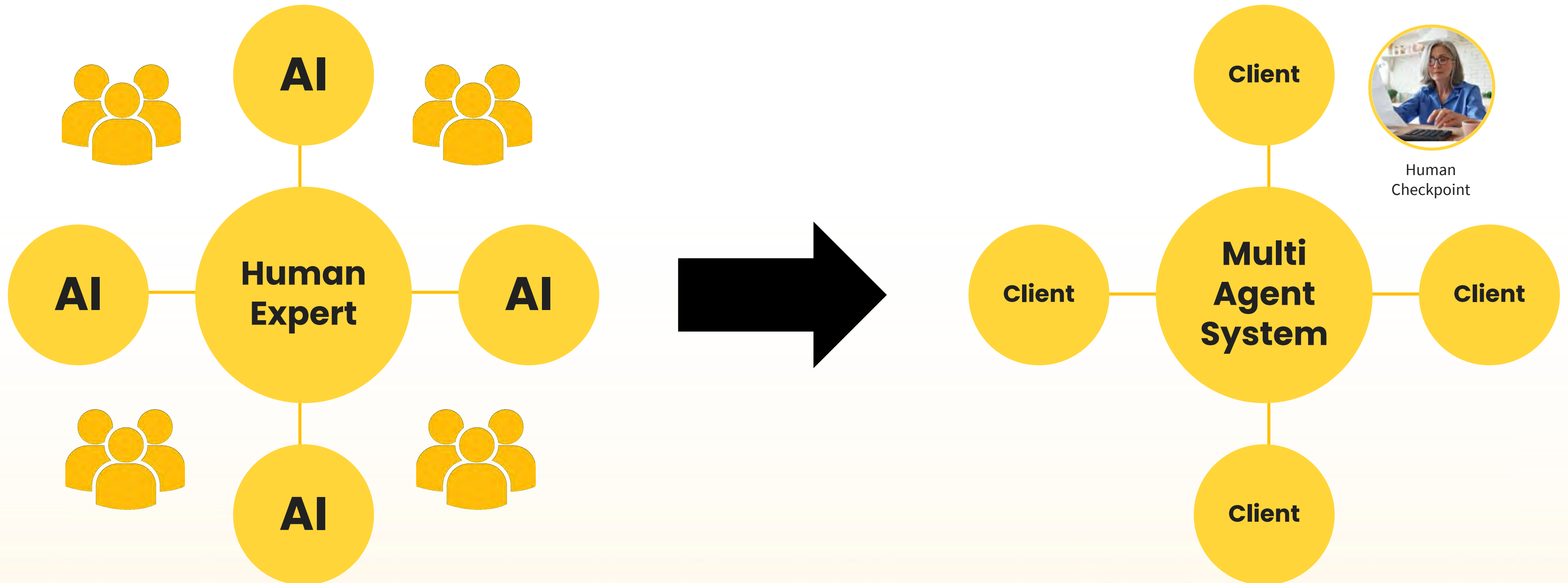
5 Years



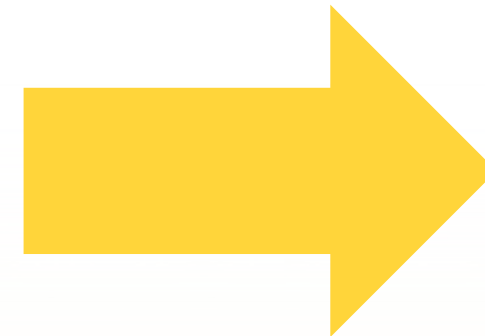
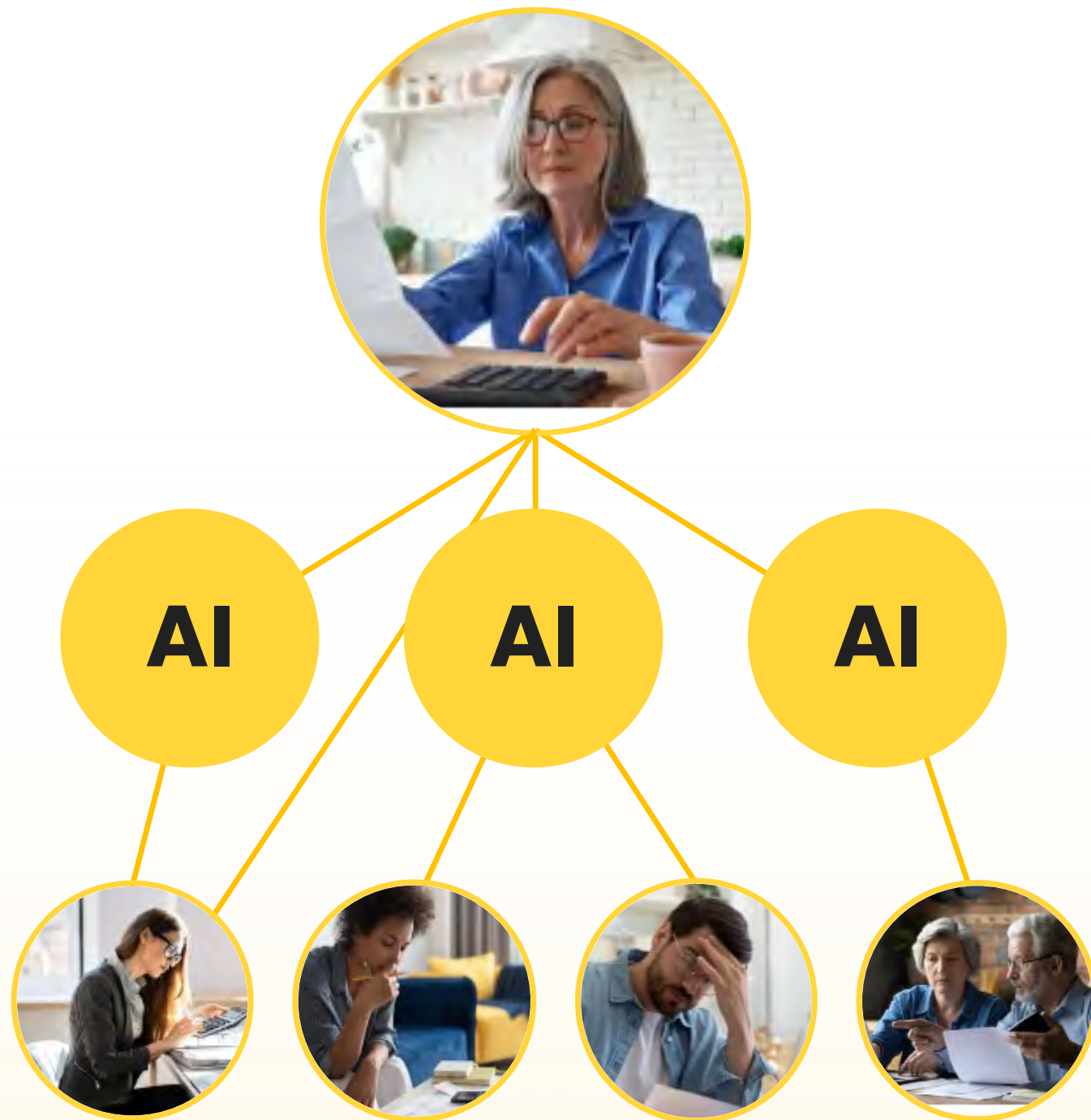
AI Operator

Model: Self-help Kiosk
Self Service
AI: Autonomous
Fully Op. w/ Human Control
Mass Market

Multi-Agent System



Multi-Agent System





Domain Focus: Tax & Financial Planning

Market Potential

United States Tax Preparation & Advisory Services

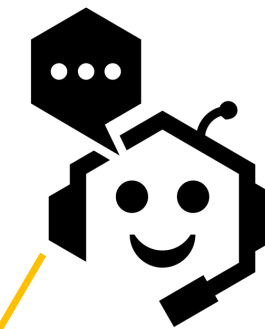
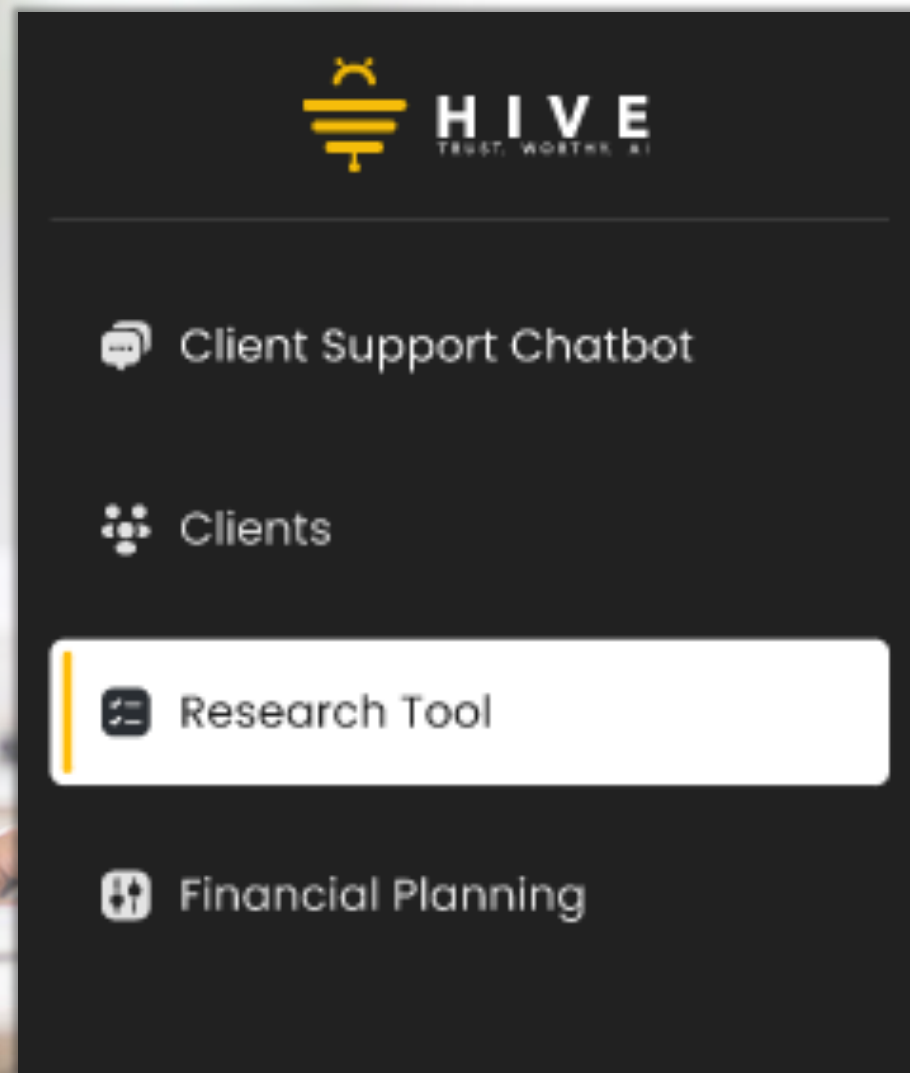
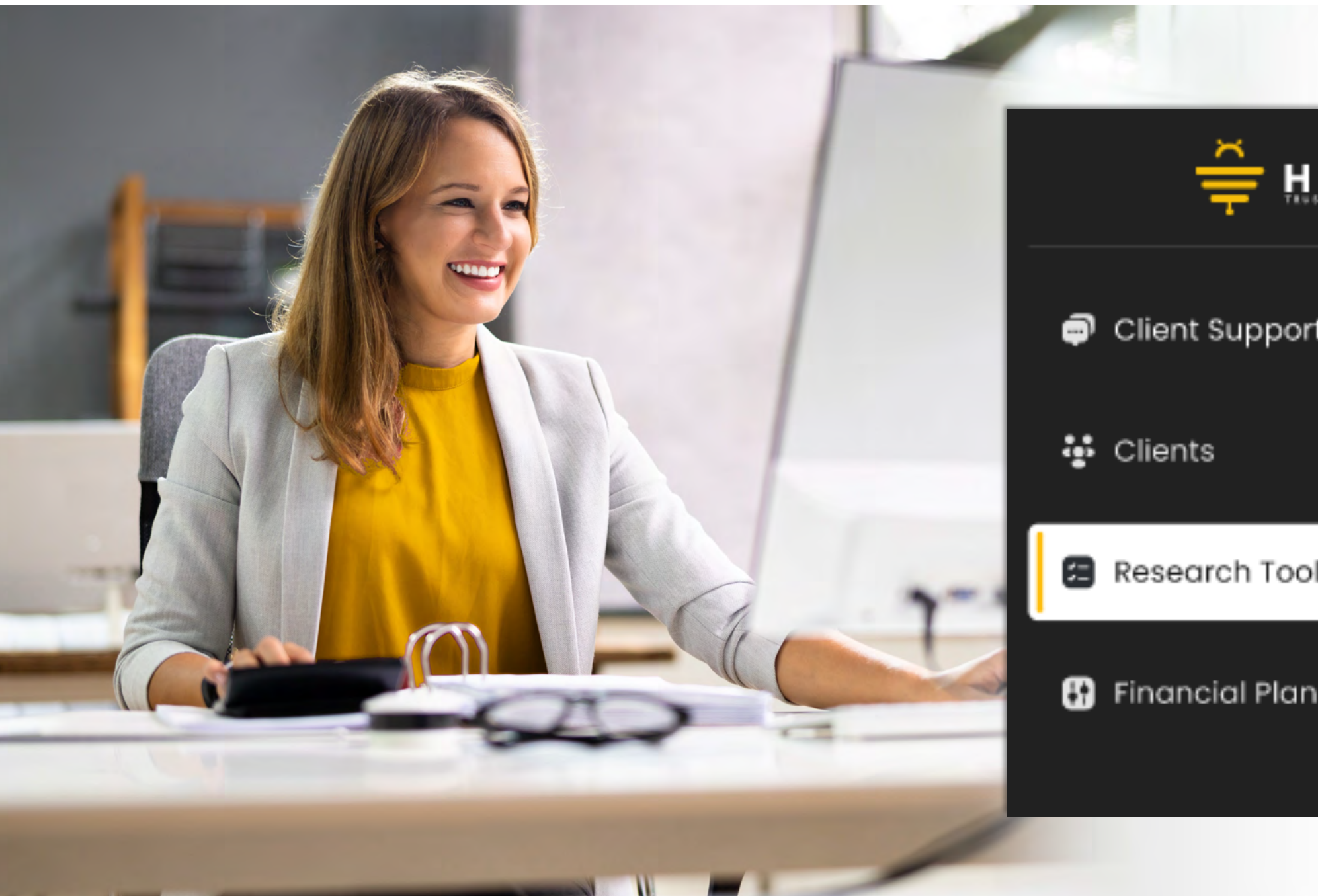
TAM \$60B / CAGR 13%

SAM \$10B

SOM 5B



More Than Just Software



More Than Just Software







Sanity, organization, and accuracy.





CPA Dashboard





TRUST WORTHY AI


👤 Clients









💬 Client Chat History 2

📊 Financial Planning Assistant

🔍 Research Assistant

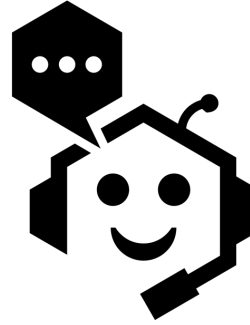
⚙️ Account Settings


 Logout


	FIRST NAME	LAST NAME	EMAIL	PHONE	STATUS
	Giana	Slixby	abc@mail.com	+1 674 234 0981	Active
	Gustavo	Saris	abc@mail.com	+1 674 234 0981	Active
	Desirae	Kenter	abc@mail.com	+1 674 234 0981	Active
	Marcus	Botosh	abc@mail.com	+1 674 234 0981	Active
	Haylie	Herwitz	abc@mail.com	+1 674 234 0981	Active
	Jakob	Curtis	abc@mail.com	+1 674 234 0981	Active
	Anika	Calzoni	abc@mail.com	+1 674 234 0981	Active
	Kierra	Aminoff	abc@mail.com	+1 674 234 0981	Active




• What info is important to show here?

• What's more valuable - showing last time client used chatbot or the number of unread?









Our Vision & Mission



Our Vision

A world where everyone's tax and finance journey is easy, enriching and empowering.



Our Mission

Our mission is to transform the way CPAs and tax practitioners serve their clients' needs.



Our Team



Lotus Li, CPA

Founder & CEO



Mark Sost

CTO



Tom Lorenc

Chief Data Scientist



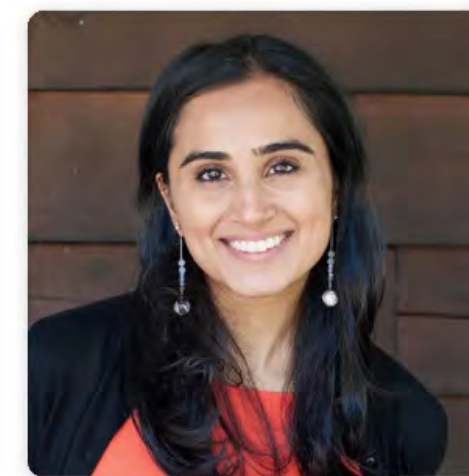
Martin Miller

Tech Advisor



Chris Campbell

Software Developer



Mona Desai

Product Designer



5-Year Projection



Exit Strategy



Questions?



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