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private AI solution that helps firms future-proof their business.

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Fieldguide, an advisory services platform, has launched Fieldguide AI, a secure and private AI solution that helps firms future-proof their business.

The new AI capabilities allow firms to securely leverage the latest AI innovations in order to significantly reduce the work and tedium associated with drafting and analyzing tests, requests, and document reviews, so that staff members can focus on more critical and higher margin work.

With the latest Fieldguide AI features, firms can increase engagement quality, margins, and staff retention, while allowing practitioners to leverage their professional expertise in more productive ways.

With Fieldguide AI, practitioners can:

- **Draft control tests based on control activities:** Fieldguide's AI suggests the appropriate control tests to perform based on the control activities identified in an engagement. This feature helps practitioners quickly and accurately identify the necessary tests to perform, streamlining the engagement process.
- **Draft requests based on control activities:** Fieldguide's AI suggests the appropriate requests for documentation and evidence based on the control activity identified in

an engagement. This feature helps practitioners quickly and accurately identify the

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activity. This feature helps practitioners improve the quality of their engagements and provide better service to their clients.

“We are excited by the launch of Fieldguide AI, since it is a significant development to positively impact our firm and the larger Advisory Services industry. AI technology enables us to work both more strategically and efficiently, and we expect it to greatly enhance the client experience. We look forward to utilizing Fieldguide AI’s capabilities as we position our firm for success,” said Kurt Gresens, managing partner at Wipfli.

With the launch of the new AI capabilities, Fieldguide takes the security and privacy of client data seriously. Fieldguide does not use user-submitted data to train or improve AI models. When interacting with Fieldguide AI, only a limited set of data is created and used to query AI models, and data is never used for training any AI models, ensuring that users’ data is kept secure and private. As a result, Fieldguide AI is one of the safest ways for CPA firms to leverage AI models while maintaining data privacy and security.

Jin Chang, CEO and cofounder of Fieldguide, stated: “CPA firms must embrace AI and automation as a key part of the servicing equation. AI is the future and our latest AI capabilities are a significant innovation for the industry. By automating tedious tasks such as drafting tests and requests, as well as assessing document adequacy, we enable practitioners to use their expertise in more productive ways.”

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