Professional services agents on Katonic

35 agents across nine areas

A firm's work runs through its practice management, document, time and billing, audit and tax systems and the documents clients send. Every agent reaches them in one of four ways, all through the same tool gateway and the same approval rules:

	HOW EACH AGENT CONNECTS
01	**A file the user uploads** in the conversation: a contract, a client's letter, a set of accounts, a draft submission.
02	**A knowledge source.** Precedents, the firm's playbooks, its methodology, its policies, engagement terms and the legislation, standards and case reports it holds are indexed in the Knowledge Engine, with each reader's permissions kept.
03	**An imported API.** The firm gives Katonic the description of an API it already runs, and the operations it chooses become tools. This is the route to systems of record: clients and matters, documents, time entries, bills, audit files.
04	**An MCP server from the catalogue,** deployed inside the firm's own cluster. This is the route to the data warehouse, reporting databases and web search.

System names are left out on purpose. The firm supplies the address and the sign-in. Nothing here is a tested integration with a named product.

THE NINE AREAS

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AREA 01

Clients and engagements

AGENT	WHAT IT DOES	READS FROM	WHERE IT STOPS FOR A PERSON
Client Intake Summary Agent	Turns an enquiry and the documents sent with it into the firm's intake form: who the client is, what is asked, the other parties, the dates that matter	The enquiry as uploaded files; the intake form as a knowledge source	The fee earner checks the summary. The agent accepts no client
Conflict Check Preparation Agent	Searches the firm's clients, matters and parties for every name in a new instruction, and lists each possible match with the record it came from	Client and matter records through an imported API	The conflicts team and the responsible partner decide. The agent clears nothing
Client Due Diligence File Agent	Checks a new client's identity and ownership documents against the firm's checklist, and lists what is missing, expired or inconsistent	Documents as uploaded files; the checklist as a knowledge source; public registers through an imported API	The compliance officer decides whether the firm can act
Engagement Letter Drafting Agent	Drafts the engagement letter from the firm's approved terms and the scope, fees and team the partner has set	The scope note as an uploaded file; approved terms as a knowledge source	The partner reviews, signs and sends the letter

AREA 02

Contracts and documents

AGENT	WHAT IT DOES	READS FROM	WHERE IT STOPS FOR A PERSON
Contract Review Agent	Compares a contract with the playbook, marks each departure and drafts suggested wording	The contract as an uploaded file; the playbook as a knowledge source	A lawyer decides every point and sends
NDA Negotiator Agent	Marks up a confidentiality agreement against the firm's standard positions and drafts the reply	The agreement as an uploaded file; standard positions as a knowledge source	A lawyer approves the markup and sends it
Contract Negotiator Agent	Sets the other side's markup against the client's positions and proposes a response for each clause, with the reason	Drafts as uploaded files; positions as a knowledge source	The lawyer decides what to concede. The agent sends nothing
Document Review Agent	Reads a set of documents and lists the clauses, dates and obligations the reviewer asked for, each with its page	Documents as uploaded files or through an imported API	The reviewer checks each entry against the page

AREA 03

Transactions and due diligence

AGENT	WHAT IT DOES	READS FROM	WHERE IT STOPS FOR A PERSON
M&A Due Diligence Agent	Reads the documents in a data room against the due diligence checklist and drafts the findings, each tied to its document	Documents as uploaded files or through an imported API; the checklist as a knowledge source	The deal team checks every finding. The report is theirs
Data Room Index Agent	Sorts the documents in a data room against the request list and lists what was asked for and not supplied	The document list through an imported API; the request list as an uploaded file	The associate sends any follow-up request
Disclosure Schedule Check Agent	Sets the disclosure schedule against the warranties and lists every warranty with no disclosure and every disclosure with no warranty	Both documents as uploaded files	The lawyer decides what to raise
Closing Checklist Agent	Lists each condition and document needed to complete, with its owner and status, from the agreement and the working file	The agreement as an uploaded file; the working file through an imported API	The lawyer running the deal confirms each item

AREA 04

Disputes and research

AGENT	WHAT IT DOES	READS FROM	WHERE IT STOPS FOR A PERSON
Case Lookup Agent	Finds the firm's past matters, advice and precedents on a question and shows the passages	The firm's matters and precedents as a knowledge source	It informs. The lawyer decides what applies
Litigation Analyzer Agent	Reads pleadings, orders and correspondence in a case and sets out the issues, the dates and the open points	Case documents as uploaded files or through an imported API	The lawyer owns the analysis and every step in the case
Citation Check Agent	Takes a draft and checks every case, statute and quotation in it against the source in the firm's library: found or not found, and whether the passage says what the draft says	The draft as an uploaded file; case reports and legislation as a knowledge source or through an imported API	The lawyer who signs reads each source. The agent files nothing
Chronology Drafting Agent	Builds a dated chronology from the documents in a case, each entry tied to its document and page	Case documents as uploaded files	The lawyer checks the chronology against the documents

AREA 05

Audit and assurance

AGENT	WHAT IT DOES	READS FROM	WHERE IT STOPS FOR A PERSON
Audit File Review Agent	Reads an audit file against the firm's methodology and lists working papers with a missing sign-off, an open review note or a conclusion with no evidence behind it	The audit file through an imported API or as uploaded files; the methodology as a knowledge source	The engagement manager and partner review and conclude. The agent signs nothing
Sample Selection Support Agent	Draws a sample from a population by the method and size the auditor sets, and records how each item was picked	The population as an uploaded file or from a reporting database	The auditor sets the method, the size and the judgement behind them
Financial Statement Tie-Out Agent	Checks that each figure in the draft statements agrees with the trial balance, the notes and last year, and lists every difference	The draft statements and trial balance as uploaded files	The audit senior resolves each difference
Audit Evidence Matching Agent	Matches sampled entries to the invoices, contracts and bank lines supplied as evidence, and lists entries with no match or a different amount	The sample and evidence as uploaded files	The auditor judges whether the evidence is enough

AREA 06

Tax

AGENT	WHAT IT DOES	READS FROM	WHERE IT STOPS FOR A PERSON
Tax Research Agent	Answers an adviser's question from the legislation, guidance and rulings the firm holds, shows each passage, and says when they are silent	Legislation, guidance and the firm's past advice as a knowledge source	It informs the adviser. The advice to the client is the adviser's
Tax Return Review Agent	Sets a prepared return against the client's records and last year's return, and lists differences and missing schedules	The return and records as uploaded files	The reviewer signs off. A person files the return
Tax Authority Letter Agent	Reads a letter from a tax authority, sets out what it asks and by when, and drafts the reply from the client file	The letter as an uploaded file; the client file through an imported API	The adviser approves and sends the reply

AREA 07

Proposals, knowledge and delivery

AGENT	WHAT IT DOES	READS FROM	WHERE IT STOPS FOR A PERSON
Proposal Writer Agent	Drafts a proposal or tender response from the firm's approved credentials, team profiles and past submissions	The request as an uploaded file; credentials as a knowledge source	The partner and the bid team approve every claim and submit
Knowledge Agent	Answers a colleague's question from the firm's own know-how, with the document cited	The firm's know-how as a knowledge source, each reader's permissions kept	It informs. Anything client-specific goes to the matter team
Deep Research Agent	Researches a market, a sector or a company from the sources it is given and writes a referenced note	The firm's research library as a knowledge source; web search where the firm allows it	The consultant checks the sources and owns the conclusions
Document Generation Agent	Drafts a report, a memo or a board paper to the firm's outline and house style	Working papers as uploaded files; templates as a knowledge source	The author reviews and issues the document

AREA 08

Time, billing and finance

AGENT	WHAT IT DOES	READS FROM	WHERE IT STOPS FOR A PERSON
Time Entry Review Agent	Reads a period's time entries and lists those with a vague narrative, a wrong code or a clash with the client's billing terms	Time entries through an imported API; billing terms as a knowledge source	The fee earner corrects their own entries
Pre-Bill Review Agent	Sets a draft bill against the engagement letter, the fee estimate and the time recorded, and lists what a partner should look at	The draft bill and time through an imported API; the engagement letter as a knowledge source	The billing partner decides every write-off and approves the bill
Billing Guidelines Check Agent	Checks a bill against the client's billing guidelines before it is sent, and lists the lines the client is likely to reject	The bill as an uploaded file; the guidelines as a knowledge source	The billing team corrects and submits the bill
Invoice Collections Agent	Lists overdue invoices by client and age and drafts the reminder for each	Invoices through an imported API	The partner or credit controller sends every reminder

AREA 09

Risk, compliance and people

AGENT	WHAT IT DOES	READS FROM	WHERE IT STOPS FOR A PERSON
Independence Check Preparation Agent	Sets a proposed engagement against the firm's list of audit clients, the services already supplied and the declared interests, and lists what the rules say must be considered	Client, service and declaration records through an imported API; the independence policy as a knowledge source	The ethics partner decides. The agent approves no engagement
Regulatory Change Summary Agent	Summarises a new rule, standard or practice direction and lists the practice areas and policies it touches	The document as an uploaded file or through web search	The risk team decides the response
HR Policy Assistant	Answers a colleague's question from the firm's own people policies, with the section cited	Policies as a knowledge source	It informs. Individual cases go to the people team
Recruiting Agent	Sets each application against the criteria the recruiter wrote, and shows the evidence for each	Applications through an imported API; the criteria from the recruiter	A recruiter decides who goes forward. The agent rejects no one

	WHAT EVERY AGENT HAS IN COMMON
01	**It runs on the firm's own infrastructure or private cloud,** with a model the firm serves. Client documents and working papers stay there.
02	**Every tool call passes the firm's policy.** A policy can allow a tool, record its use, hold it for a person's approval, or block it, for the whole firm or for one team.
03	**A tool that changes something waits for approval** unless the firm has decided otherwise for that tool. That is how no letter, bill, return or filing goes out unapproved.
04	**The agent acts as the person using it.** It sees the matters and client files that person may see, and no others. Information barriers hold for the agent as they hold for the person.
05	**Every citation shows its source.** Where the firm's library has no passage for a point, the agent says so.
06	**Every call is recorded,** with who asked, which tool, and what was decided, and an agent, a tool or a whole server can be switched off at once.

WHERE TO START

Pick work where reading is slow, the decision stays with a professional, and no client, court or authority waits on the agent.

THREE PLACES THAT FIT

Citation Check

Every case and quotation in a draft is set against the source before the lawyer signs. Nothing leaves the firm.

Conflict Check Preparation

The agent lists every possible match with its record. The conflicts team decides.

Audit File Review

The agent lists missing sign-offs and open review notes before the partner's review. The partner concludes.

One team, one office, invented data first. Then beside the manual process, measured against it.

Each one prepares the work. A named professional decides.

About Katonic AI

Katonic AI builds the platform that organisations use to build, run and govern AI agents on their own infrastructure: in their own data centre, in a private or sovereign cloud, or with no connection to the internet at all. The platform is in production with governments, banks, telecom operators and utilities. Katonic is certified to ISO 27001.

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