AI agents for the work behind the advice

Agents that read your contracts, your files and your precedents, prepare the work, and stop for a named professional. On infrastructure you control.

THE PROBLEM

Most of the templates we opened for legal and accounting work describe no step where a person approves, and we found none for audit sampling or an engagement letter. Of 3,836 operations in 145 public interfaces, 2,048 are sent as changes, and the method alone cannot tell which only read.

HOW IT WORKS, IN THREE STEPS

STEP 01

Connect what the agent may read.

Precedents, playbooks, methodology and the legislation you hold become knowledge sources, with each reader's permissions kept. Matters, documents, time entries and audit files are reached through the description of an interface you already run; the data warehouse through a reporting database, read only.

STEP 02

Decide where it stops.

Every tool call passes your policy. A tool that changes a matter, a bill or a document waits for a named professional.

STEP 03

Run it where the data lives.

In your data centre or your private cloud, on a model you serve.

THE RULE EVERY AGENT FOLLOWS

It prepares. A named professional decides.

Thirty-five agents in nine areas

Clients and engagements	Client Intake Summary. Conflict Check Preparation. Client Due Diligence File. Engagement Letter Drafting
Contracts and documents	Contract Review. NDA Negotiator. Contract Negotiator. Document Review
Transactions and due diligence	M&A Due Diligence. Data Room Index. Disclosure Schedule Check. Closing Checklist
Disputes and research	Case Lookup. Litigation Analyzer. Citation Check. Chronology Drafting
Audit and assurance	Audit File Review. Sample Selection Support. Financial Statement Tie-Out. Audit Evidence Matching
Tax	Tax Research. Tax Return Review. Tax Authority Letter
Proposals, knowledge and delivery	Proposal Writer. Knowledge. Deep Research. Document Generation
Time, billing and finance	Time Entry Review. Pre-Bill Review. Billing Guidelines Check. Invoice Collections
Risk, compliance and people	Independence Check Preparation. Regulatory Change Summary. HR Policy Assistant. Recruiting

Also in the pack: the full list with what each agent reads and where it stops, and the white paper “AI agents inside the firm”, with its sources.

Seven questions to ask before an agent touches a client file

01 Where does it run, and where is the model?

02 Does it keep each person’s permissions and barriers?

03 Which tools change a matter, a bill or a document, and does each wait for a person?

04 Where is the step at which a named professional approves?

05 Does every citation show its source, and what does it do when it has none?

06 What is recorded, and for how long?

07 Can we stop one agent, one tool, or all of them, at once?

WHERE THE PLATFORM RUNS TODAY

In production at a top-tier bank in Asia, air-gapped, inside the bank’s own perimeter.

Where to start

One team, one office, invented data first. A citation check can start on invented drafts, because no client system is touched.

KATONIC.AI/SOLUTIONS/PROFESSIONAL-SERVICES