

92% ACCURACY. TAX NOTICES CLASSIFIED. PENALTIES ELIMINATED.

Leading US Investment Management Firm | AI-Powered Tax Document Classification



INFLECTION POINT

- Scanned tax documents classified manually | **Zero automation, 100% human review**
- Inaccurate entity extraction slowing decisions | **Wrong jurisdiction, wrong action, real penalties**
- No real-time tagging or categorization | **Delays compounding financial & reputational risk**
- Manual review bottleneck at scale | **Every notice a liability waiting to happen**

EXIQO™ ENGINEERED FIX

OptimaAI Platform: OCR + CNN + Logistic Regression — classification & real-time tagging coordinated end-to-end | **92% document classification accuracy**

Context Engineering: Llama 2 context-tuned for organization, jurisdiction & tax period extraction | **85%+ entity extraction accuracy**

AI SDLC Playbook: Automated testing, confidence-based flagging & feedback loops — model validated before every deployment | **Zero manual QA on classification pipeline**

AI-EV Program: Aspirant-to-Builder pathway → engineers owning NLP pipelines, model retraining & production classification ops | **Compressed onboarding, self-sustaining delivery**

92%

Classification Accuracy — manual review eliminated, notices actioned in real time

Zero

Categorization delays