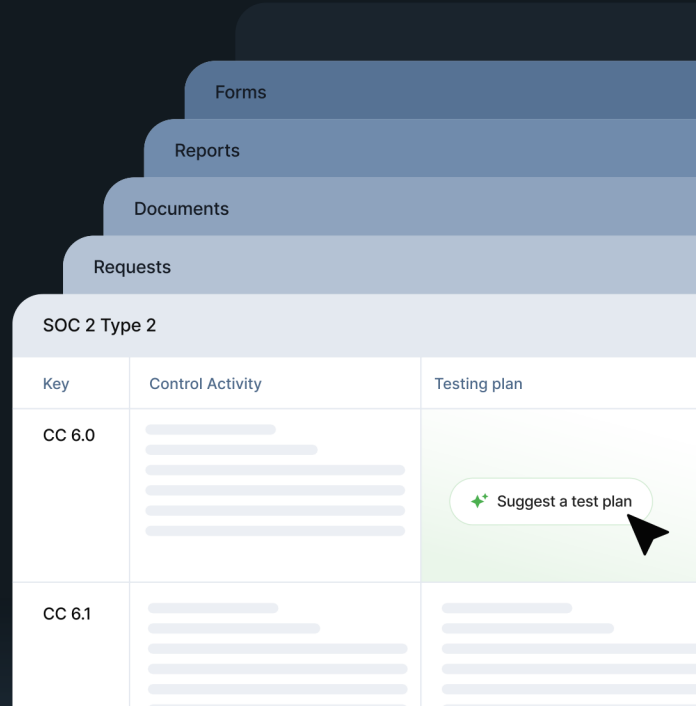# FIELDGUIDE

AI Advisory & Audit Cloud

FIELDGUIDE

Product Overview

Founded by former auditors and consultants, Fieldguide is the AI Advisory & Audit Cloud designed to enable firms to streamline and manage any type of engagement. In the face of unprecedented demand for advisory and audit services, the rising impact of AI in the industry, and a sharply declining talent supply, Fieldguide is on a mission to deliver technology that provides the leverage that firms need to consistently deliver highly profitable, modern services to their clients.

Fieldguide provides end-to-end visibility across all engagements, streamlined collaboration with distributed clients and teams, and unparalleled staff productivity for all types of advisory and audit engagements. Instead of juggling siloed legacy tools, practitioners can rely on Fieldguide as a single source of truth, with a comprehensive set of capabilities required to efficiently manage engagements from kickoff to completion.

AI-powered recommendations, streamlined requests, collaborative document management, and one-click reports are just some of the unique Fieldguide features designed to help firms drive greater visibility, efficiency, and profitability across engagements, while delivering a world-class client experience.

Top 500 firms trust Fieldguide to improve efficiency, revenue, and client experiences.

WIPFLI   withum⁺   Warren Averett   Aprio   BerryDunn

The Fieldguide Difference

AI-Powered Automation

Fieldguide provides firms all the capabilities they need for engagements, from readiness to the final audit report

→ End-to-end functionality for the entire engagement lifecycle, including readiness assessments, requests, testing, workpapers, and reports

→ AI-powered recommendations for all aspects of an engagement, including document review, initial test plans, and remediation recommendations

→ Built-in best practices for any advisory services, including security certifications, internal audits, and consulting

Intuitive Ease of Use

Easy, intuitive and modern features help streamline engagements

→ Streamlined document management, including collaborative document editing and versioning

→ Intelligent cross-mapping and linking across documents, controls, and engagement types

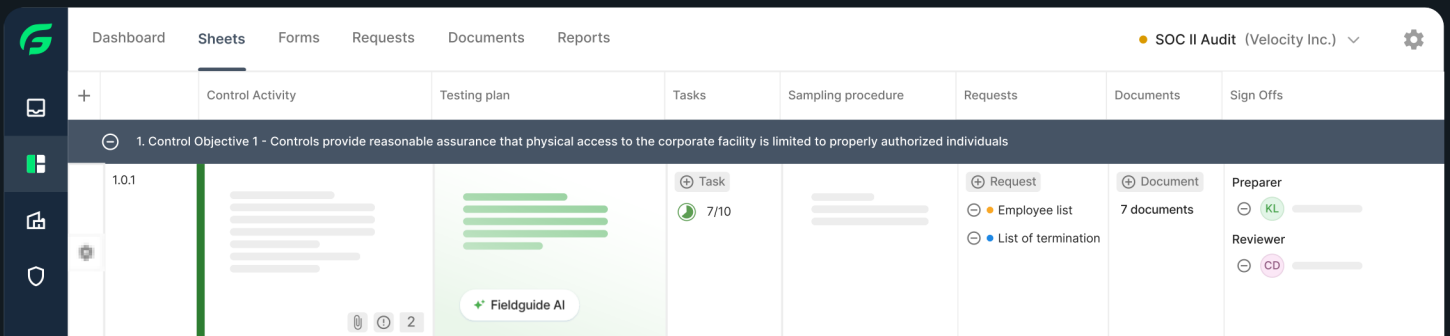→ Easy "one-click" report creation and collaboration

Exceptional Experience

Fieldguide's first-class collaboration capabilities help firms transform the client experience

→ Single source of truth for firms and clients that keeps project work on track and on budget

→ Streamlined communication via client questionnaires, real-time collaboration, requests, approvals, and chat

→ Cloud-native platform for secure and easy access anywhere

| REQUESTS | PLANNING | DATA INGESTION | TESTING | REPORTING | CLOSE |

| | ADVISORY | | | AUDIT | |

	SOLUTIONS	Risk Advisory	SOC Readiness	Privacy and Cybersecurity	Regulatory Compliance	SOC Audit	IT Audit	Financial Audit
	PRODUCTS	Artificial Intelligence	Analytics & Insights	Request Management	Engagement Hub	Reporting Automation	Client Hub
	ENTERPRISE	Security	Integrations	Permissions	Backup	Changelog	SSO

Fieldguide's AI Advisory & Audit Cloud

Fieldguide is built on a modern cloud platform with a full set of capabilities to support your advisory services engagements. With Fieldguide, customers can increase efficiency and save 35 - 50% of hours per engagement by

→ Driving visibility, consistency, and control across all clients, engagements, and services

→ Increasing efficiency and delighting staff by reducing manual work and potential errors

→ Improving the client experience by reducing miscommunication and simplifying collaboration

"Software for accounting firms is notoriously outdated, slow, and hard to use. Fieldguide is different – it's a streamlined, cloud-first approach."

Kate Williams
Risk Assurance & Advisory Partner
Maxwell Locke & Ritter

ML&R

Key Highlights

→ **Fieldguide Document Management** replaces audit binders with integrated workpaper management. Integration to MS Office eliminates tedious check-in/check-out, renaming, and version control.

→ **Fieldguide Reporting** saves countless hours by replacing the copy/paste approach with one click that generates a custom templated report for your firm.

→ **Fieldguide Client Hub** is a modern client portal that makes it easy for clients to interact with staff members over requests, documents, discussions, and more.

→ **Fieldguide AI** is the industry's first practitioner-centric AI solution that provides staff members intelligent recommendations and streamline manual tasks, so they can focus on more critical and higher margin work.

→ **Fieldguide Request Management** facilitates client collaboration and eliminate tedious back-and-forth emails. Both practitioners and clients can easily see what requests are pending or complete.

→ **Fieldguide Engagement Hub** centralizes everything a practitioner needs for one single source of truth for the entire firm, including requests, sign-offs, and testing – all in one easy to manage matrix.