

TRUSS TRIBE · LIVE SERIES

Meet Max AI.

Your new sidekick — inside every Truss surface, from intake to delivery.

TODAY

Agenda.

A short walk through Max — what it does,
where it shows up, and how to turn it on.

Question of the Day

Meet Max — the short version

Max in your workflow

Trust & control

Turning Max on this week

Ten sessions. You are here.

PART 1

Settings: Build Your Foundation

The core configuration walk-through.

REPLAY AVAILABLE

PART 2

Settings: Power Moves & Pro Tips

Advanced configuration, automations, edge cases.

REPLAY AVAILABLE

PART 3

Contacts, Entities & Drive

The Truss backbone.

REPLAY AVAILABLE

PART 4

Meet Max AI

Your new sidekick.

TODAY

IN SESSION

PART 5

New Client Intake & Recurring Tasks

Get a season off the ground.

REGISTER →

PART 6

Organizers, Reimagined

From PDF to structured intake.

REGISTER →

PART 7

Workpapers Made Simple

Review-ready in one click.

REGISTER →

PART 8

Assembly & Delivery

Send, signed, finished.

REGISTER →

PART 9

Client Experience

Next-level experience for taxpayers.

REGISTER →

PART 10

File Sharing & E-Signatures

Secure handoff, end to end.

REGISTER →

PART 1 OF 3

Meet Max.

The short version — what Max is, what it does, and where it lives.

DEFINITION

What is Max AI?

MAX

A tax-native AI sidekick.

Max is built into Truss. It reads the documents you upload, drafts the work you'd otherwise do by hand, and reminds you about the things that fall through the cracks — under your supervision, on your firm's data.

- Lives in the same Truss you already use — no new login, no new tab
- Knows the forms, schedules, and vocabulary of US tax
- Suggests; never sends or signs on its own

MAX

SMITH HOUSEHOLD · 2024 1040

What's missing from this return?

I see a **1099-DIV** is in the inbox but not yet linked to this project.
W-2 referenced in the prior year that hasn't been uploaded for 2024, and the spouse's

Request from

Link the
W-2

Dismiss

Draft the request.

Ask Max about this return...

Ask

WHAT MAX DOES

Three jobs, one teammate.

01

Reads.

Pulls structured data out of the documents your clients hand you.

W-2, 1099, K-1, 1098, brokerage statements
Prior year returns and source documents
Engagement letters, organizers, scanned forms

02

Drafts.

Writes the first version of the thing you were going to write anyway.

Client follow-up emails and reminders
Workpaper packets and tickmarks
Review notes and prep summaries

03

Reminds.

Surfaces what falls between the cracks before a return ships.

Missing source documents
Year-over-year inconsistencies
Unsigned forms and pending vouchers

WHERE MAX LIVES

Built in, not bolted on.

Max is not a separate app or a Chrome extension. It is the same sidebar you already see — across every surface in Truss.

In

Intake

Sort & tag uploads

Or

Organizers

Map docs to questions

Wp

Workpapers

Build the packet

Pr

Prep

Assemble return data

Rv

Review

Flag the gaps

Cm

Comms

Draft the email

PART 2 OF 3

Max in your workflow.

Six surfaces, six concrete moves. Walking left-to-right through a typical return.

Sort the inbox.

When a client uploads a stack of documents, Max names them, tags them, and routes them to the right project — before you open the first one.

- Identifies the form type from the document itself
- Renames using your firm's naming convention
- Matches to the right Contact and Entity
- Flags anything that doesn't belong

● MAX

INBOX · 6 NEW UPLOADS

scan_001.pdf →
2024 W2 Smith.pdf

W-2 · Smith Household

IMG_2391.heic →
2024 1098 Smith.pdf

1098 · Smith Household

brokerage.pdf →
2024 1099B Smith.pdf

1099-B · Smith Household

family_photo.jpg — not a tax document

REVIEW

k1_partnership.pdf →
2024_K1_ABC_LL_C.pdf

K-1 · ABC LLC

Five renamed and routed. One flagged for you.

Accept

Answer from the documents.

Max reads the documents the client has already uploaded and pre-fills the organizer with the answers it finds.

Pre-populates income, deduction, and dependent questions

Cites the source document for every answer

Leaves judgement-call questions for the client

Highlights anything that disagrees with prior year

MAX

2024 ORGANIZER · PAGE 4 OF 12

WAGES, SALARIES, TIPS

\$184,200 from 2024_W2_Smith.pdf · box 1

MORTGAGE INTEREST PAID

\$22,418 from 2024_1098_Smith.pdf · box 1

YEAR-OVER-YEAR CHANGE

Charitable contributions dropped from **\$14,200** to **\$0**. Confirm with client.

DID YOU SELL ANY PROPERTY?

Left for client — judgement call.

Assemble the packet.

Max builds a review-ready workpaper packet from the documents you've collected — in the order a reviewer expects to see them.

- Sorts source documents into the right schedules
- Generates tickmarks and lead sheets
- Reconciles totals against the return data
- Notes any reconciling items for the reviewer

● MAX

SMITH HOUSEHOLD · WORKPAPER PACKET

A · INCOME

A-1 · W-2 lead sheet

Reconciled

A-2 · 1099-DIV / INT

Reconciled

A-3 · 1099-B brokerage

\$1.2k diff

B · DEDUCTIONS

B-1 · Mortgage interest

Reconciled

B-2 · State / local taxes

Reconciled

C · PASS-THROUGH

C-1 · K-1 · ABC LLC

Reconciled

7 sheets · 1 reconciling item · ready for review.

Open

Handed off to a preparer.

When you send a return to Truss Prep, Max travels with it — giving the preparer everything they need without a single back-and-forth email.

Truss Prep is AI + human. Max does the structured work; a US-based preparer reviews, signs off, and answers the judgement calls.

Engagement summary, prior year comparison, and open questions

Source document index keyed to the workpaper packet

Preparer notes posted back into the project, never in email

WITHOUT MAX

3.4 hours of organizing, then prep.

Time spent renaming files, building lead sheets, and writing the handoff email — before anyone touches the return itself.

WITH MAX

Twelve minutes of review, then prep.

Max delivers the packet; you spot-check the reconciling items and the year-over-year flags before sending.

Catch the small stuff first.

Max runs through every return before you sign off — looking for the kinds of small things that, statistically, are how returns get sent back.

- Year-over-year discrepancies that don't have a stated reason
- Missing 1099s implied by bank or brokerage activity
- State residency days inconsistent with prior year
- Dependents aging out of credits
- Estimated payment vouchers missing or duplicated

LIKELY MISSING

1099-INT from **Chase 4471** — interest paid in 2023, no 2024 form on file.

YOY CHANGE

Charitable contributions **-100%** (from \$14,200). No note from client.

AGING OUT

Dependent **Emma Smith** turns 17 in 2024 — CTC drops to ODC.

ALL CLEAR

Wages, mortgage interest, K-1, and state withholding all tie to source documents.

MAX · COMMUNICATIONS

Drafts that sound like you.

Max writes the email you were going to write. You read it, edit it, send it — or don't. Nothing leaves the firm without a person clicking **Send**.

- Document request emails with exactly the missing items listed
- Status updates pegged to the return's current state
- Estimated payment reminders with voucher attached
- Engagement-letter follow-ups by tier and tag

● MAX

DRAFT · DOCUMENT REQUEST

To john.smith@example.com

Subject A couple of items to wrap up your 2024 return

Hi John,

Thanks for sending over the W-2 and brokerage statements. To get your 2024 return finished, we still need a few things:

- 2024 Form 1099-INT from your Chase savings account (4471)
- Confirmation of charitable contributions for 2024 — last year you noted \$14,200; we don't have a 2024 figure yet
- A copy of Emma's most recent tuition statement, if applicable

You can drop these in the portal at any time — no need to reply. Happy to chat if anything's unclear.

— Lisa

Drafted by Max · waiting on your review.

Send

EARLY ACCESS · 14 FIRMS · SPRING 2025

The numbers so far.

2.8_x

RETURNS PER PREPARER / WEEK

Measured from intake-to-delivery across 1040 returns in the early access cohort.

71%

LESS ADMIN TIME

Time spent renaming, sorting, and chasing source documents before prep can begin.

93%

OF CLIENTS RESPOND ON FIRST ASK

Up from 64% — Max's document requests list exactly what is missing, with portal links.

Self-reported by 14 firms in the Max early access program, January – April 2025. Your results will vary by client mix and firm operating model.

PART 3 OF 3

Trust & control.

What Max does with your data — and the things it will never do on its own.

SECURITY

Your data stays yours.

Same Truss platform you already trust. Same SOC 2 Type II controls. No exceptions for Max.

Client data is never used to train a public model

Firm data is logically isolated per workspace

Encryption at rest and in transit, no changes

Every Max action is auditable in the project log

IN ONE SENTENCE

Built in, not bolted on.

Max lives inside the same SOC 2 Type II certified Truss platform — not on a vendor's server, not in another browser tab.

SOC 2 TYPE II

AES-256

NO MODEL TRAINING

CONTROL

Max suggests. You approve.

Every outbound action — every email, every file delivery, every status change a client sees — requires a person clicking the button.

RULE OF THUMB

If a client sees it, you sent it.

Max can draft, organize, and reconcile inside the firm. It cannot deliver anything to the outside world without explicit firm approval.

Inside the firm — Max acts.

Renames files. Routes uploads. Reconciles workpapers. Builds prep packets.
Drafts emails.

Outside the firm — Max waits.

Doesn't send email. Doesn't share documents. Doesn't notify clients. Doesn't sign anything.

BOUNDARIES

What Max won't do.

The list of things Max declines, even if you ask. By design.

Sign returns or forms. Signatures stay with the preparer of record.

Send anything to a client. Drafts only. A person approves every outbound message.

Make judgement calls. Open questions are routed to the preparer, not auto-answered.

Touch returns marked "for review only." Read-only access, no edits, no actions.

Cross workspace boundaries. Your firm's data never leaks into another firm's Max.

Train on your client data. Period.

PART 3 OF 3 · PRACTICAL

Turning Max on.

Three steps and a few tips for your first week.

SETUP

Three steps to live.

Settings → AI & Automations → **Enable**
Max

Toggles Max on for the whole firm
Admin permission required

Pick the surfaces Max can touch

Start with Intake and Organizers
Add Workpapers, Prep, Review, Comms when ready

Set the approval rules

Default: every outbound action needs a person
Loosen for routine tasks if it makes sense for your firm

Recommended rollout

- Week 1** — turn Max on for Intake only; let it sort uploads
- Week 2** — add Organizers; review pre-filled answers as a team
- Week 3** — add Workpapers; pick five returns to walk through end-to-end
- Week 4** — Comms drafts; review the first ten emails before sending

There is no separate Max bill. If your firm is on Truss, Max is included — same plan, same seats.

FIELD NOTES

Tips from the early access firms.

Run Max on your messiest client first.

The intake savings show up in the long tail, not the easy ones. Pick the client whose folder looks like a yard sale.

Read the first ten drafts.

Then read the next ten faster. By the time you've read thirty, you'll know Max's voice and where to nudge it.

Treat YoY flags as a checklist.

Every flag is a small conversation with the client — that you would have had eventually, three weeks later, by email.

Don't fight the renames.

If Max's naming convention isn't yours, change the convention once in Settings. Don't override every file.

TRIBE LIVE · SESSION 05

Up next.

New Client Intake & Recurring Tasks — how to get a season off the ground without losing the first two weeks to setup.

PART 5

New Client Intake & Recurring Tasks

Get a season off the ground — templates, automations, and the new client checklist Max helps you run.

[REGISTER AT TRUSS.APP/TRIBE](https://truss.app/tribe) →

QUESTIONS?

Thank

Drop your questions in the chat — we'll stay on for fifteen minutes.

you.