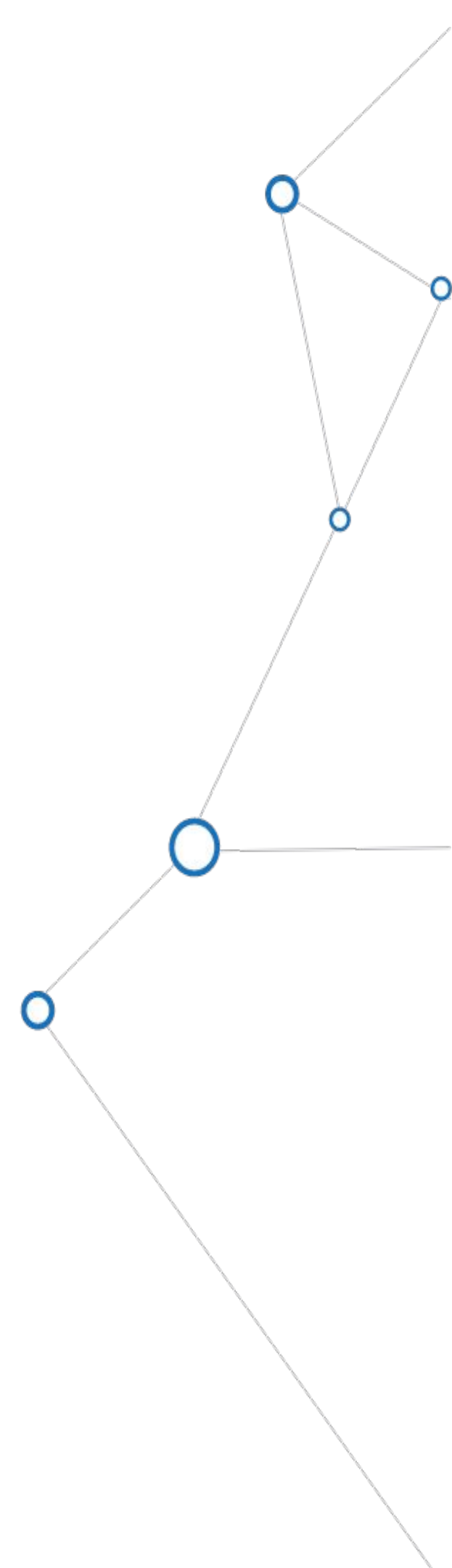




**FOUNDATION AI**  
Automate **Document-Driven** Work



# ABOUT FAI

## > Firm Profile:

Foundation AI works with over 100 marquee law firms across the country, handling injury litigation. From Personal Injury, Veterans Affairs, Social Security and Disability, and Workers Compensation, Foundation AI processes, names, and sorts millions of documents a year.

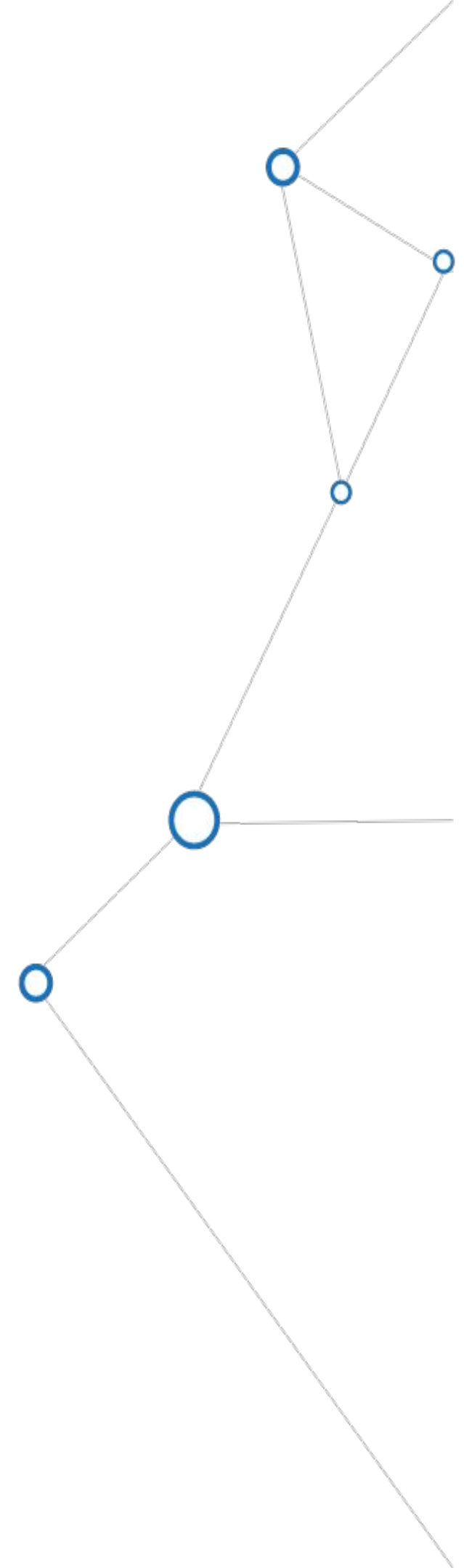
## > The Product (aka “The Pitch”):

The Foundation AI product works in the bedrock of a law firm's operations, driving automation in the process of profiling, naming, and organizing inbound documents. The FAI product connects on one end to the inbound streams of documents (scanner, e-mail box, e-fax, etc) and on the other end to SmartAdvocate.

As the document passes through that bridge, the documents are matched to the right matter, classified to the right folder, and named to the firm's naming conventions. Highly configurable to meet firms where they are with their processes, naming conventions, and firm set up

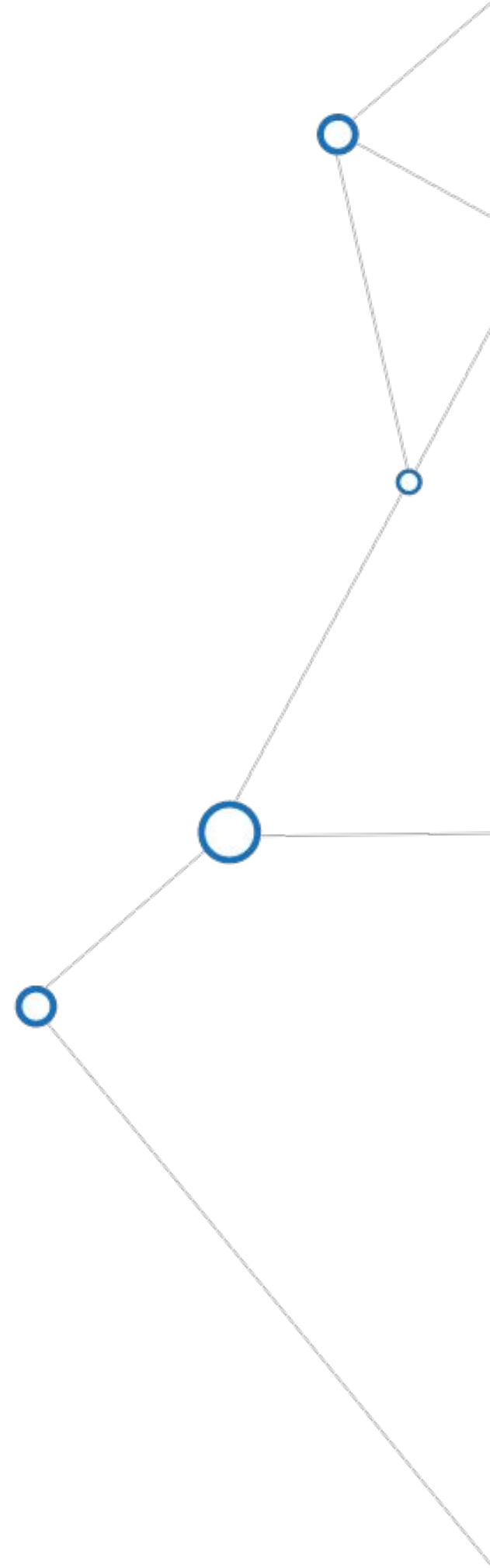
## > Why our AI?

Foundation AI is the only AI with reliable confidence scores so the firm knows what they know and know when they need help by a human-in-the-loop.



# HOW FOUNDATION AI WORKS

- Managing inbound documents—whether from **mail, email, court links, or faxes**—is often manual, time-consuming, and prone to errors. Renaming documents, properly filing them, and notifying the appropriate team members leads to **misplaced files, wasted effort, and increased risk.**
- **Foundation AI** simplifies this by integrating with the firm's existing document sources and case management system (i.e., SmartAdvocate) capturing, classifying, and properly naming each incoming document. By using matter-specific data, it matches every file to the correct case and instantly alerts the right team members, ensuring nothing slips through the cracks.
- Firms like **Rob Levine Law, Newman Anzalone & Newman, ACTS Law & Kenny Habetz Injury Law** rely on Foundation AI to eliminate the frustrations of manual document handling. The result is a more consistent, efficient, and error-free workflow—so their teams can focus on better things and not deal with the administrative headaches.



# DEMO TIME!

# HERE'S WHAT CLIENTS ARE SAYING

“

We're processing our case documents **8x faster**, giving us more time to fight for our clients.

**Angel Reyes**  
Managing Partner, Angel Reyes & Associates



”

“

With **Foundation AI**, we're getting our documents named, saved, and routed same day. It makes us **10x more responsive** and helps keep us ahead of the competition.

**Michael Burgis, Esq.**  
Lead Trial & Managing Attorney  
Michael Burgis & Associates, P.C.



Michael Burgis & Associates, P.C.

”

“

We've **removed human error** from our mailroom, nothing gets missed anymore, and we now have clean data in all of our files — it's a huge **competitive advantage**.

**Steve Mehr**  
Founding Partner, Sweet James



”

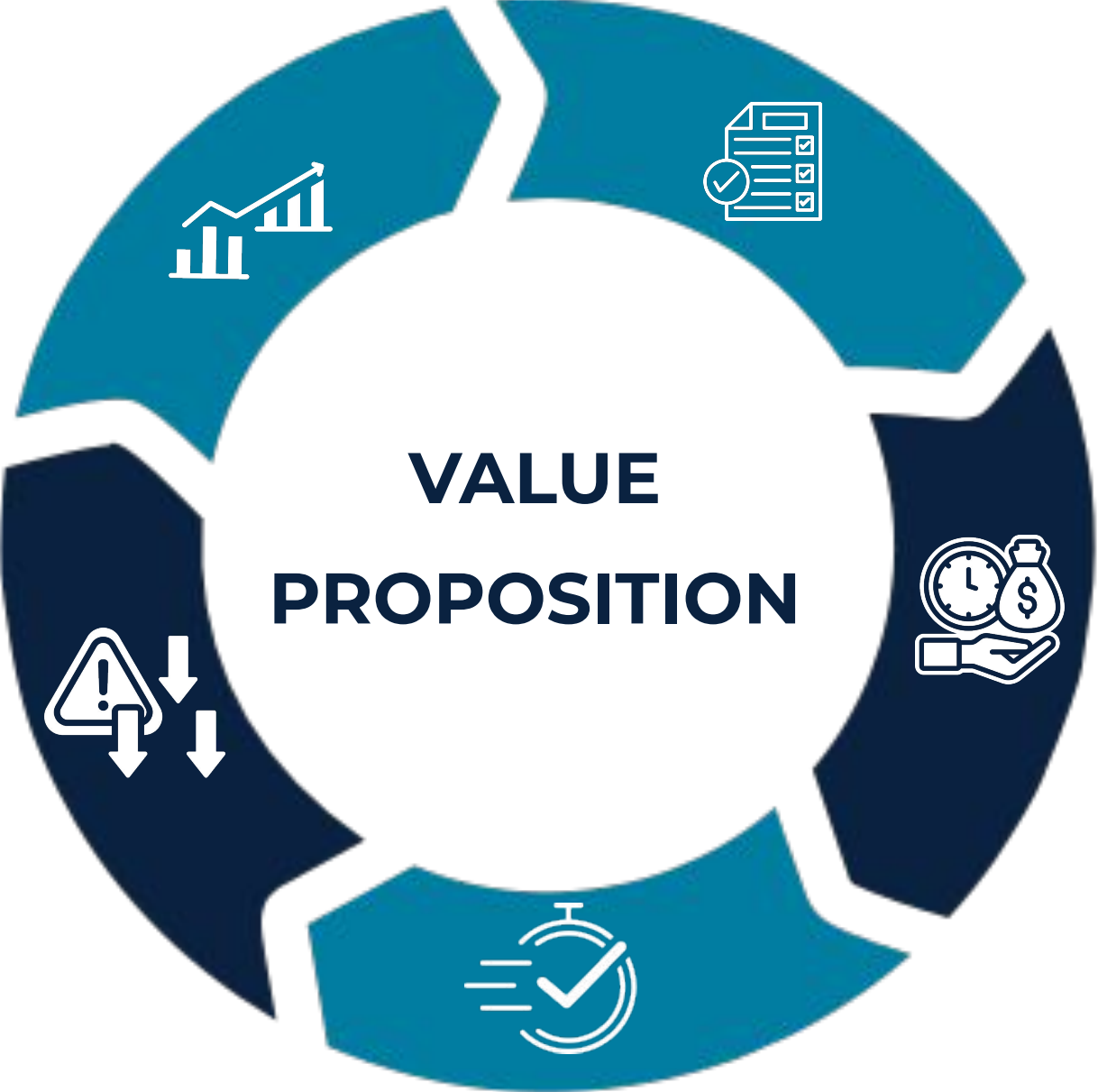
# HOW WE DELIVER VALUE

## Scalability

Foundation AI allows firms to take on more cases without having to onboard more staff.

## Risk Reduction

We help ensure every document makes it into SmartAdvocate automatically without the human risk of misfiling, mislabeling or forgetting.



## Standardization

Foundation AI takes human error out of the equation ensuring all naming, foldering, and alerting processes are followed as the firm wants, every time.

## Time & Cost Savings

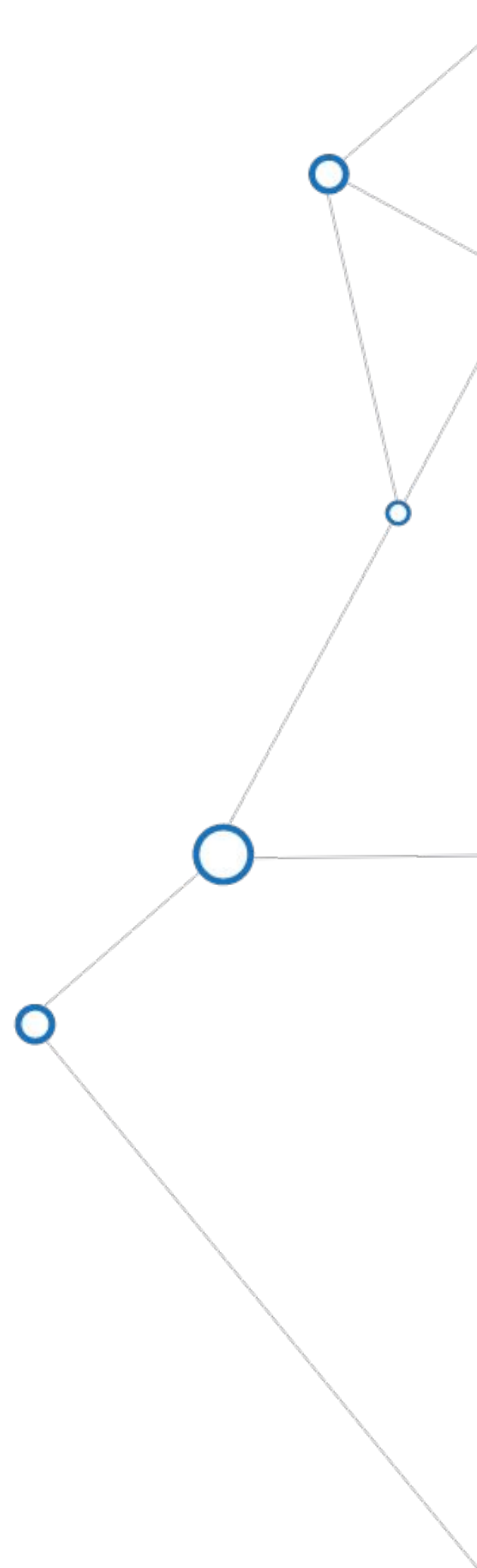
Firms handling this work manually generally take between 3-5 minutes per document. Foundation AI cuts that down to 30 seconds or less.

## Speed

Get documents reviewed by the right person, right away. The platform helps firms go from a backlog of 2-3 days to same day turnaround.

# WHY FAI + SmartAdvocate

- Incoming case documents are the foundation to every case
- Receiving these case documents, emails, and attachments to the right matter, folder, and people is invaluable to the firm
- FAI + SmartAdvocate integration partnership offers document ingestion and data entry solutions to SmartAdvocate firms that are not available through any other means
- Consistency - Documents will be named and notified consistently as well as ensuring each document gets the proper Category and Subcategory assigned.
- Risk Mitigation - Takes human decision-making out of uploading documents into Smart Advocate, regardless of how they come in, ensuring 100% compliance.



# FAQS

## ➤ **How accurate is Foundation AI's software?**

Through reliable confidence scores and human-in-the-loop validation, a firm can set their own parameters for accuracy for each decision to ensure maximum accuracy and automation.

## ➤ **Can my firm keep our naming conventions?**

Yes. The firm can input their own rules around naming, foldering, and alerting for each document that the Foundation AI platform recognizes, and make adjustments as needed throughout the lifetime of the product.

## ➤ **How secure is my firm's data?**

Foundation AI is SOC 2 Type 2 certified, HIPPA compliant and is fully dedicated to ensuring complete security of the sensitive data that runs through it.

## ➤ **How long is the implementation process?**

The implementation timeline is dependent on how quickly the firm can assess and relay their naming, alerting, and foldering requirements.

## ➤ **After I am live, what does support look like?**

Foundation AI has Customer Success representatives that can help provide trainings, insight, and suggestions to help you maximize the use of the software. Foundation AI's Customer Support team are also available 24/5 to help with any technical issues a user might need help with.



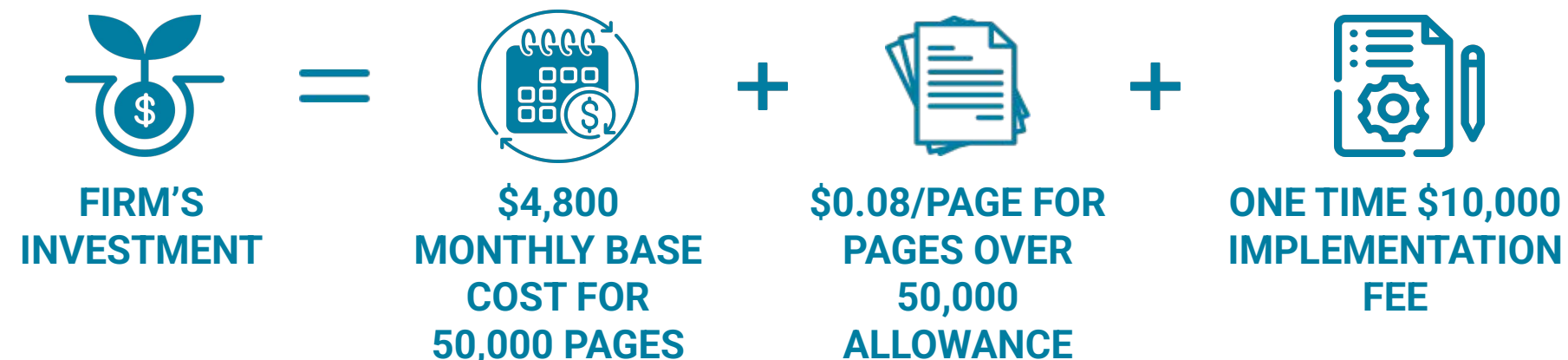
# PRICING MODEL

➤ Our pricing model is based on page volume, but we avoid emphasizing this to prevent delays in the sales cycle and the need for clients to count their monthly pages. Instead, we offer packages:

- **Monthly Packages:** Firms commit to a monthly minimum page volume for a fixed monthly cost.
- **Overage Charges:** Additional pages beyond the monthly allowance are billed at a set rate per page.
- **Implementation Fee:** There is a one-time implementation fee of \$7,000. When necessary to push deals across, we can offer a discounted implementation fee instead of discounting monthly costs.
- **Pricing Tiers Range:** \$2,500 - \$10,000 per month

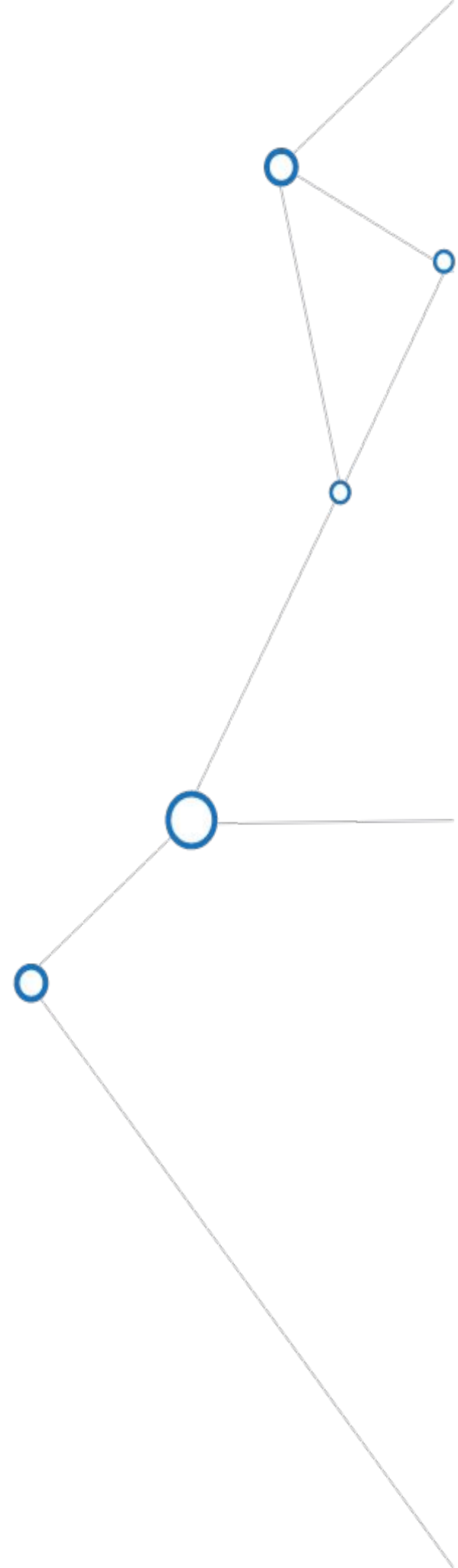
➤ For example, here is our package for firms with 10-20 attorneys:

- **Monthly Cost:** \$4,800
- **Included Pages:** 50,000 pages per month
- **Page Overage:** \$0.08 per page for any pages exceeding the 50,000 limit.



# HOW TO QUALIFY A FIRM

- Practice Areas: Personal Injury (General PI, WC, SSD, VA)
- Firm Size: Firms with 40+ Employees (bigger the firm = more cases = more incoming documents)
- Case Volume: 500-600 Open Cases
- Prospect Wants to Learn More or Schedule a Demo: Email Dylan (cc: Melanie & Allison)



# CONTACT INFO



➤ **Dylan Willett**  
Strategic Solutions Manager  
dylan.w@foundationai.com



➤ **Melanie Pita, Esq.**  
Chief Product & Strategy Officer  
melanie.p@foundationai.com

