Balance Sheet Data

For established US accounting & CPA firms

Is your firm a fit? *A quick checklist* for accounting & CPA firms.

AI data buyers license copies of real business records. Your firm keeps its originals. Use this list to see whether your firm looks like what buyers usually look for. Every firm still goes through the buyer's own review, and nothing is promised.

01 · RECORDS BUYERS OFTEN ASK ABOUT

Do you have years of these, in digital form?

- ☐ Engagement and project history
- ☐ Process documents and SOPs
- ☐ Internal guides and knowledge bases
- ☐ Business email
- ☐ Templates, checklists, and other everyday documents

02 · WHAT STAYS OUT

Your firm decides what's in and what's out.

- × Who your clients are, plus their personal and financial details
- × Data your firm only licenses from someone else, such as research services or vendor content
- × Documents covered by a confidentiality agreement or engagement terms that limit sharing
- × Anything a regulator or professional rule requires you to keep confidential
- × Passwords, logins, and bank or account numbers
- × Client info without each client's written consent; tax return info without Section 7216 consent. Ask your counsel or ethics advisor.

03 · WHO IS USUALLY A GOOD FIT

Tick each line that describes your firm.

☐ **Type of firm**	An established accounting or CPA firm
☐ **Location**	Based in the United States
☐ **Size**	About 15 or more full-time desk staff may qualify. Smaller firms are welcome to ask.
☐ **Records**	Years of digital records: documents, SOPs, engagement history, email, internal guides
☐ **Software**	About 3 or more years on the same main tools. Most everyday software works, so this usually isn't a hurdle. Examples: tax and audit (CCH Axcess, UltraTax CS, Lacerte, ProConnect, Drake, ProSeries, ATX, CaseWare); practice management (Karbon, Canopy, TaxDome, Practice CS); client books (QuickBooks, Xero, Sage); email and files (Gmail, Google Workspace, Microsoft 365, Outlook, Dropbox, SharePoint); CRM (HubSpot, Salesforce, GoHighLevel); support desks (Zendesk, Freshdesk). Other tools are fine too.
☐ **Language**	Digital records mostly in English
☐ **Decision**	Someone who can decide for the firm applies, or joins the call if you have one
× **Usually not a fit**	Paper-only firms, or very new firms without years of digital records

Privacy: buyers typically replace names, emails, account numbers and other personal details with placeholders before any records are used. Exact privacy steps are set by each buyer and spelled out in their agreement before anything is shared.

04 · HOW IT WORKS

Apply directly, or ask Dan first. You decide at each step.

STEP 1 · OPTIONAL
Ask
Have questions? Book a free 15-minute phone call. Not a sales call, and nothing to buy. No files needed.

STEP 2
Apply
Your firm applies directly with the buyer through its sign-up link, found on the Balance Sheet Data website.

STEP 3
Review
The buyer runs its own review. If they want to move forward, they make an offer. Your firm can say yes or no.

Scan to check if your firm qualifies
/apply

Acceptance and pricing are decided by the buyer. No amount or acceptance is promised. Free for your firm: Balance Sheet Data is paid by the AI data buyer, never by your firm, and only if your firm is accepted. We never ask for passwords.