

ChatGPT for CPAs



Kevin Fream

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ChatGPT for Accounting?

*Probability model that creates
text-based answers – terrible
at accurate accounting*

Who Is Kevin Fream?

- Name is a cybersecurity industry trademark
- Inventor of Delta Method for competitive advantage
- Best-selling author of Easy Prey and Streamline Your Technology
- Featured speaker at Harvard, NASDAQ, and national TV news.



Requirements

Microsoft, Google, or Apple account

[ChatGPT \(openai.com\)](https://openai.com)

Willingness to learn / experiment

Biggest Secret TRAIN

*Tell the scenario or persona
the AI should use before
asking to complete a task*



#1 Client Communication

LinkedIn Posts
E-mail templates
Letter notices



#2 Streamline Operations



CREATE STANDARD
PROCEDURES



ANALYZE /
RESEARCH



BASIC
TRANSACTIONS

#3 Efficient Bookkeeping



Create Standard
Procedures



Analyze /
Research



Basic transactions

#4 Financial Planning

Retirement Planning

Investment Strategies

Personal Finance

What To Do Now:

**Ask questions, experiment, and
verify results.**



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