Advisory file — ready to sign

LINDBERGH FORMATION — 16 rue de Maillé, 91310 Montlhéry, France · Companies register (RCS) Evry 817 946 114

Document issued on 09/11/2026

Purchase of a commercial vehicle · fictional document

> **Fictional document — demonstration example**
> This document is produced by the Blue Lemon Agent website to illustrate what an AI agent hands to its users. The companies, matters, amounts and people in it are invented. It has no legal, accounting or commercial value.

> **Fictional document**, produced for the demonstration — amounts, dates and documents invented. **This file contains no conclusion.** Tax advice engages the firm's liability and it is a signature that engages it: **the agent makes sure the person who signs has nothing left to look for.**

The facts, taken from the client's file alone

Fact	Value	Document quoted
Purchase date	14/03	Supplier invoice, document 3312
Amount	**€27,400 excl. VAT**	Supplier invoice, document 3312
Financing	48-month lease	Contract, document 3318
Monthly instalment	€612	Schedule attached to the contract
Registration date	21/03	Registration certificate, document 3325

What the file does not say — and what decides the answer

Missing element	Why it is decisive	Question drafted for the client
Exact category shown on the registration certificate	**It governs the treatment that applies**	“Could you send us the certificate, both sides?”
Actual use of the vehicle	**Mixed use does not call for the same answer**	“Is the vehicle used privately, even occasionally?”

The two questions fit in three lines and go out today. An advisory file that waits three weeks for a client's answer is a client who has already decided on their own — and who will call the firm afterwards.

What the firm has already answered on comparable files

Position of the firm	Last applied	Signatory	Files concerned
Position no. 12 — leased vehicle, exclusively business use	09/2025	Certified accountant	17
Position no. 19 — mixed use declared by the director	02/2026	Certified accountant	9
Position no. 27 — records to keep and retention period	11/2025	Quality partner	31

> **This is the firm's doctrine, not the agent's opinion.** It is what makes a Perrelet & Associés client get the same answer whichever staff member prepares the file — and it is an argument few firms can demonstrate in writing.

The gain, quantified

Measure	Today	With the agent

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Time to build an advisory file	48 minutes	**22 minutes**
Advisory enquiries per month	61	61 — **the volume does not change, the time does**
Hours handed back per month	—	**26 h — 3.7 staff-days**

Circuit

Prepared on _____ by the firm's assistant · **Draft — unsigned**

Certified accountant's signature: _____ · Date: _____

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> https://bluelemonagent.ai/en/entreprises/cas-usage/agent-de-support-comptable-client-cabinet

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