



Advisory file — ready to sign

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

Document issued on 24/09/2026

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

LINDBERGH FORMATION — a simplified joint-stock company with share capital of €250,000 · Registered office: 16 rue de Maillé, 91310 Montlhéry, France · Companies register (RCS) Evry 817 946 114 · SIRET 817 946 114 00029 · VAT FR 60 817 946 114 · "Blue Lemon Agent" trade mark · Training-provider registration no. 119 108 635 91 (Île-de-France prefect — this registration does not amount to State approval) · Qualiopi certified, no. 03896, for the "training actions" category · contact@bluelemonagent.ai · dpo@bluelemonagent.ai · Hosted in France.

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
---------	-------	----------------

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: _____

Scope of this document: the service operated by Blue Lemon Agent. For an agent deployed at your premises, the applicable location is that of the architecture set out in the quotation and verified before commissioning; local execution is announced only for the configuration explicitly described and accepted in the quotation; the applicable isolation depends on the deployment mode set out in the quotation, no dedicated isolation being presumed; the encryption mechanisms in transit and at rest, their components and key management are those documented for the architecture chosen; roles and permissions are configured and accepted for the identities and systems actually connected; the events logged, their content, their retention period and who may access them are defined for the deployment chosen.