Summary of a complex file — estate, three properties

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

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2 hours down to 24 minutes · 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. **The summary fits on one page and the complete file stays underneath, document by document. The difficulty of an estate file has never been understanding the law: it has always been rebuilding the facts.**

What the summary carries

Element	Content	Source
Chronology	**31 dated events over five years, from the death to the three taxes challenged**	**Each with the document that establishes it**
The three properties	**Area, regime, occupancy situation year by year**	Declarations and deeds produced

Element	Content	Source
Amounts at stake	**Tax challenged per property and per year, total claimed, and the part that can no longer be challenged because it was not claimed within the period open**	**That point decides half the file, and it appears on the first line**
Points to settle	**4**	**Each with the documents that support it and what the file does not say**
Missing documents	**2**	**Named, with the written request ready to go to the notaries concerned**

The time this shifts

Item	Share of preparatory time	Duration	Annual volume	Time returned
Assembling and checking a tax-relief file	**100 % → 20 %**	**2 h → 24 min**	**160**	**256 hours**

What it changes for the case handler, even more than the hours: they open the file already knowing what the four points to settle are. **The decision to grant relief stays with the competent body, and it reaches them reasoned, measured and documented within four hours.**

The 22 files already summarised on arrival

Measure	Value	Reading
Decision given earlier	**31 days on average**	**The summary was done before the case handler opened the file**
Closed with no further document	**5 out of 22**	**The missing document had been requested on arrival**

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Summarising in advance costs nothing to try: it happens as heavy files arrive, without waiting for a case handler to open them, and **the complete file stays consultable document by document underneath.**

For the office to settle

Criterion chosen for classing a file as “heavy”: _____

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https://bluelemonagent.ai/en/secteur-public/metiers/agent-ia-gestionnaire-fiscal

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