Gatepost Snapshot

Prepared for Sample Tax Practice (fictional, 12 people) | 15 November 2026 | Based on answers from the office manager

IN ONE SENTENCE

From what you told us, all three of your AI tools need attention, and the most serious is an automation set up by someone who has left that still reaches client documents.

YOUR TOOLS AT A GLANCE

Tool	What it can reach	Can it act	Rating
Automation tool	Client documents, practice software	Not sure	High
Email assistant	Email, calendar	Sends, edits, deletes	High
ChatGPT	Pasted text (personal accounts)	Read only	High

WHAT TO DO FIRST

Have your IT provider remove the former colleague's automation connections and re-create only the ones still needed under a current owner.

WHAT YOU TOLD US ABOUT THE FIRM

- Staff have left in the last 12 months.
- There is no written policy covering AI tools.
- An outside IT provider would make any changes.

HOW WE GOT HERE

This Snapshot is based only on the answers given on the Gatepost Review form. We did not log in, observe any setting or verify anything. A full review is where we check. It is not legal advice, not a penetration test, and does not certify that your firm complies with any law.

Your three highest-risk items

1. Automation tool High

What you told us	It was set up by someone who has left, it connects to client documents and practice software, and you were not sure whether it can act or whose account it uses.
Why it matters	Its connections may still run under a former colleague's access, with nobody watching what it does.
The fix	**Name a current owner. Remove the leaver's connections and keys and re-create them under the owner's account.**
Who can do it	Your IT provider, in about an hour.

2. Email assistant High

What you told us	It is connected to email and calendar and can send, edit or delete.
Why it matters	It can send or delete client email without a person approving it.
The fix	**Switch it to draft-only, so a person presses send.**
Who can do it	The partner who owns the account, in about ten minutes.

3. ChatGPT High

What you told us	Staff use personal accounts and paste text in.
Why it matters	Client information is going into personal accounts the firm does not control.
The fix	**Move this work to a firm-paid business plan and stop client work on personal accounts.**
Who can do it	A partner decides and your IT provider sets it up, in about a day.

WHAT WE COULD NOT JUDGE FROM YOUR ANSWERS

- The exact permissions each tool holds. Tools often have more access than their owners expect.
- AI tools staff use that were not listed on the form.
- Old connections and access keys that are still active.
- Whether the automation tool can act, and whose account it runs under.

IF YOU WANT THESE VERIFIED

A full review observes the actual settings, maps every connection and gives you a written report in five working days, for a fixed fee agreed in writing. Your $149 Snapshot fee is credited in full if you book within 30 days.