香港華人會計師公會
The Society of Chinese Accountants & Auditors

AI FOR ACCOUNTANTS:
BOOST EFFICIENCY AND UNLOCK INSIGHTS

ATung Lee 利國棟

ATUNG LEE

CHANNEL NAME: AFORADVICE
TRADE NAME: LEE IN ACTION

Trusted consultant to top-level management, offering invaluable strategic insights and customer-centric IT solutions, enabling companies to stay ahead of the curve

- Digital Transformation
- AI Office Automation
- Project Management
- eCommerce
- No Code AI
- Training

Digital Transformation Consultants and Instructors
2022 -
Consultant to Wintech, the official E&E infrastructure solution providers to HKT and MTR, on digital transformation projects.
Corporate Trainer to 100+ staff companies on various digital environment adaptations.

Preface AI and Generation Org
2024 -
Instructors on digital tools engagement.
Corporate digital workforce enabler.
Facilitator on SEN students on Quality Assurance Testing

HKET, ON.CC, eCargo eCommerce and Asiaray Outdoor Advertising
1999 - 2021

As an accomplished professional, pivotal roles held include Project Manager, Product Manager, Digital Director, and General Manager of Digital Business Units at prominent listed co. Expertise lies in driving digital business development, spearheading digital transformation initiatives, automating business processes across operations, sales, and accounting, delivering innovative solutions that propelled businesses towards digital excellence

Digital transformation consultation

Training and workshop conductor on AI application in eCommerce to 40+ companies since 2023

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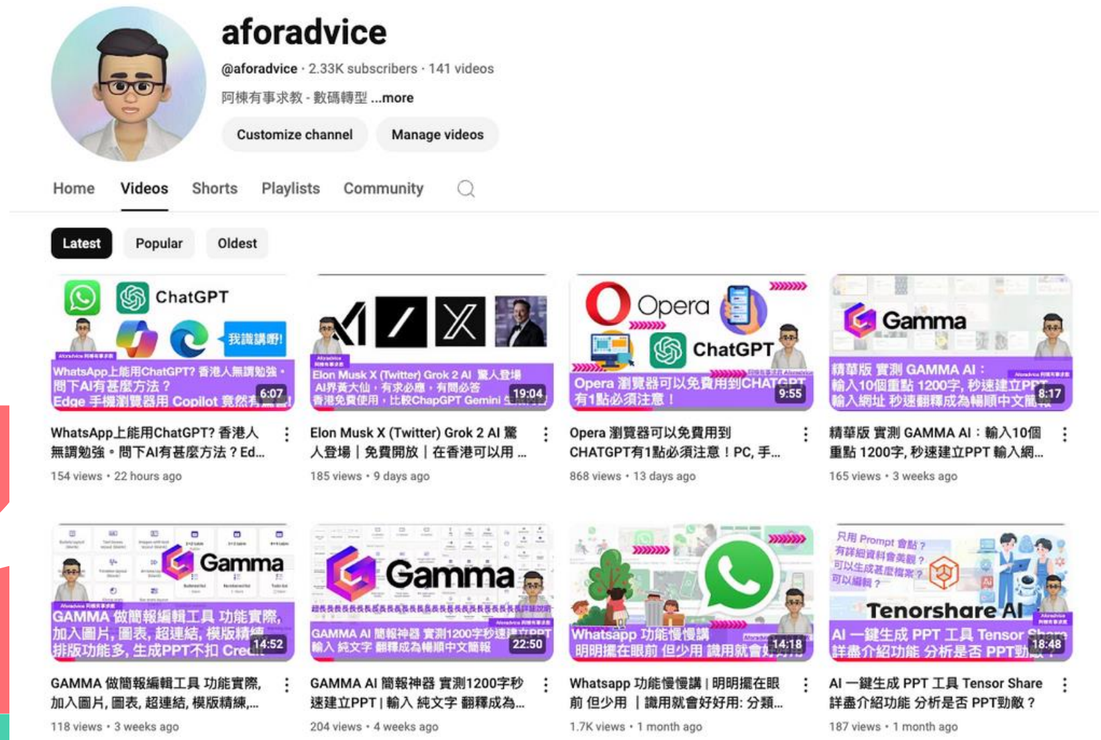
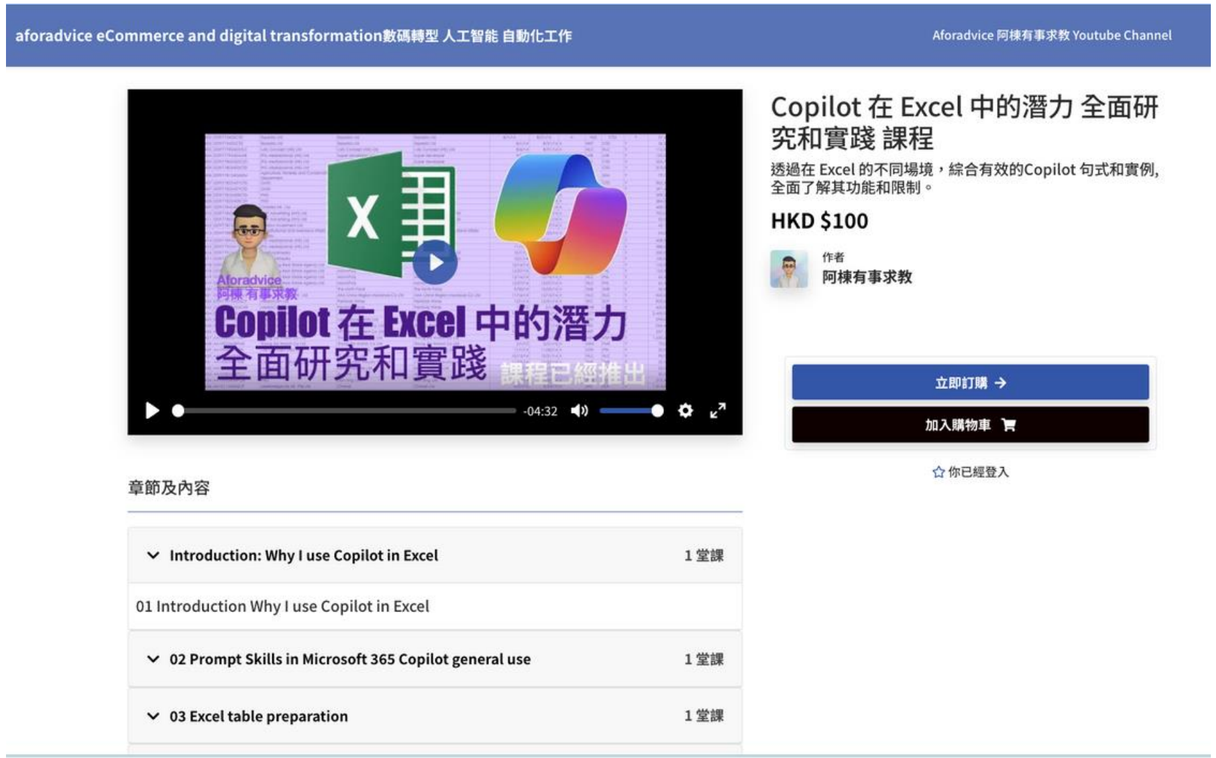


RakoSell

https://aforadvice.rakosell.com/



AFTER THE SHARING SESSION, ATTENDEES WILL HAVE BETTER UNDERSTANDINGS:

01 – Understand Different AI Assistant

02 – Daily office use

03 – Copilot and Google AI

perplexity

Copilot

GROK

deepseek

https://lmarena.ai/

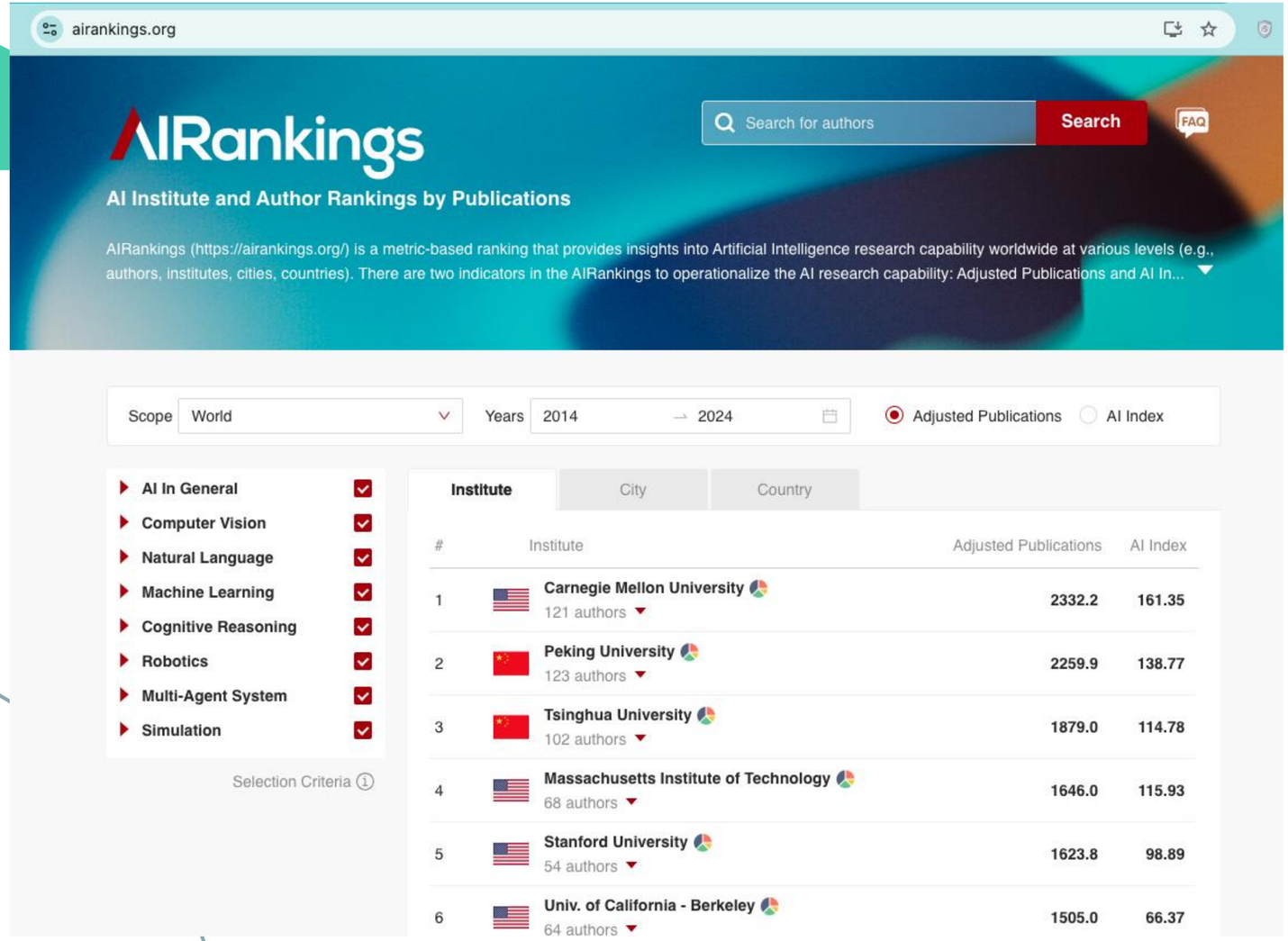
Total #models: **209**. Total #votes: **2,725,075**. Last updated: 2025-02-27.

Chatbot Arena Overview (Task)

Sort by Rank | Sort by Arena Score

Model	Overall	Overall w/ Style Control	Hard Prompts	Hard Prompts w/ Style Control	Coding	Math	Creativ Writing	Instructio Following	Longer Query	Mu Tur
early-grok-3	1	1	1	1	1	1	1	1	1	
gemini-2.0-flash-thinking-exp-01-21	2	4	2	3	2	1	1	2	2	
gemini-2.0-pro-exp-02-05	2	3	1	1	2	1	2	2	1	
chatgpt-4o-latest-20250129	2	1	4	1	2	11	1	2	1	
deepseek-r1	5	3	3	1	2	1	3	2	5	

https://airankings.org/faq



- # Copilot in whatsapp

Copilot

Convenient but not very update
https://youtu.be/zdBkLH3IXCo?si=czCi3EKUD7mvhKot

Copilot in Excel

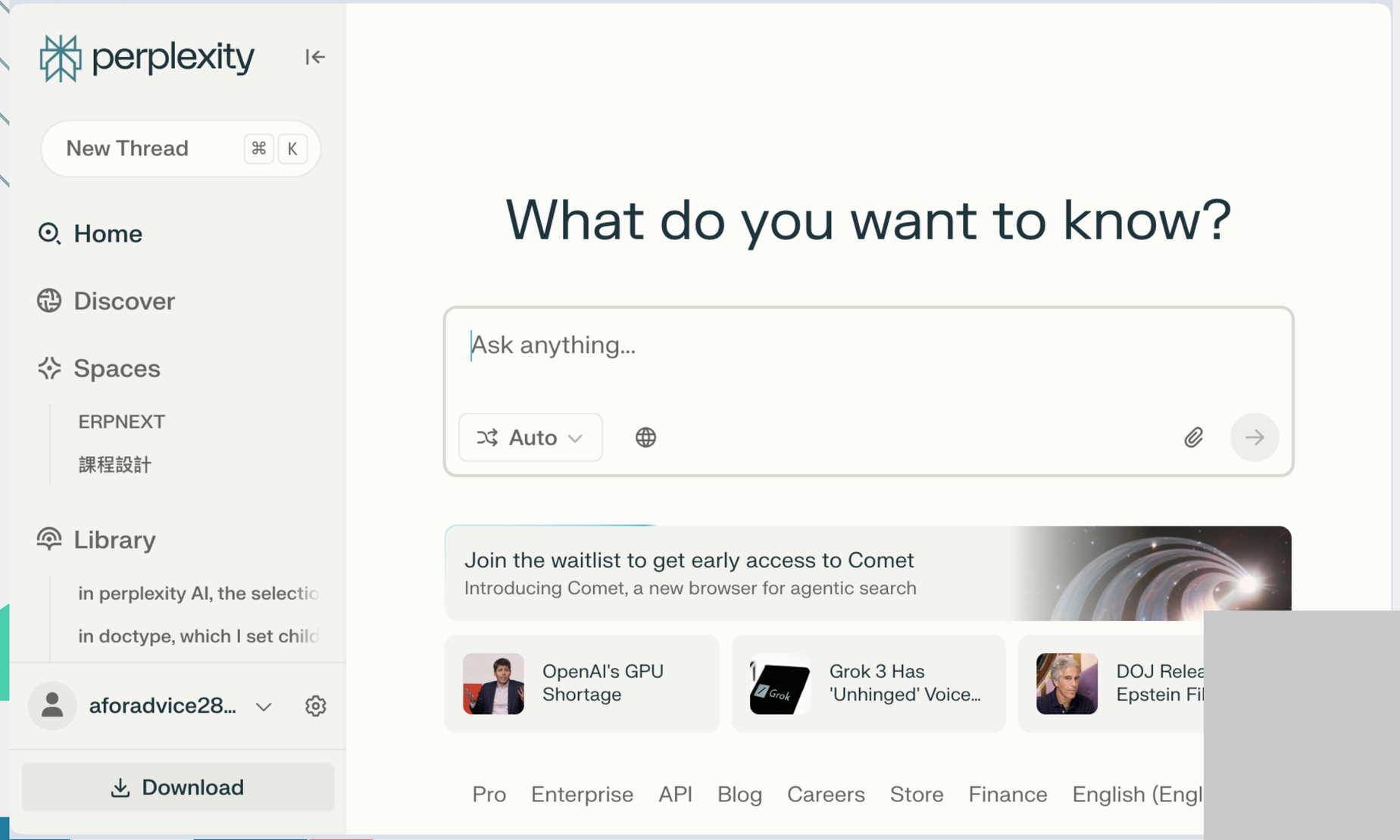
Copilot

Excel

help me to create a pivot table that allow me to easily check the Billing amount by year of date, by teamhead, by dept head and by salesman

1.Creating a new column that sums up the billing amount for each year.
2.Creating a pivot table that allows you to analyze the billing amount by multiple fields (team head, department head, salesman) and year.
3.Organizing the pivot table so that team head, department head, salesman, and year are in the rows, and the total billing amount is in the columns.

• Perplexity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To start a prompt, remember GCSE

Goal sets the intention of the request

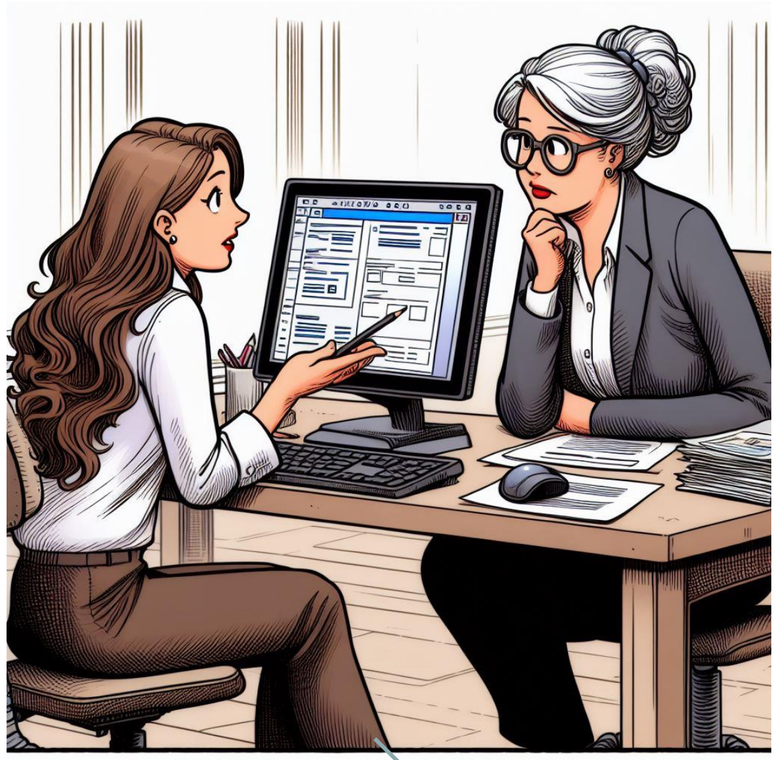
Context provides background information

Source indicates the type of information needed

Expectation clarifies what the user hopes to receive in response.

Prompt 1 : “I have a spreadsheet with sales data and I need to analyze performance by region and product. Can you guide me through the process of creating a pivot table in Excel? I’m looking for a clear, step-by-step explanation.”

- **Goal:** To create a pivot table from a dataset.
- **Context:** The user has a large dataset of sales data and wants to analyze sales performance by region and product.
- **Source:** The user’s data is organized in an Excel spreadsheet with columns for region, product, and sales figures.
- **Expectation:** The user expects a step-by-step guide on how to create a pivot table in Excel

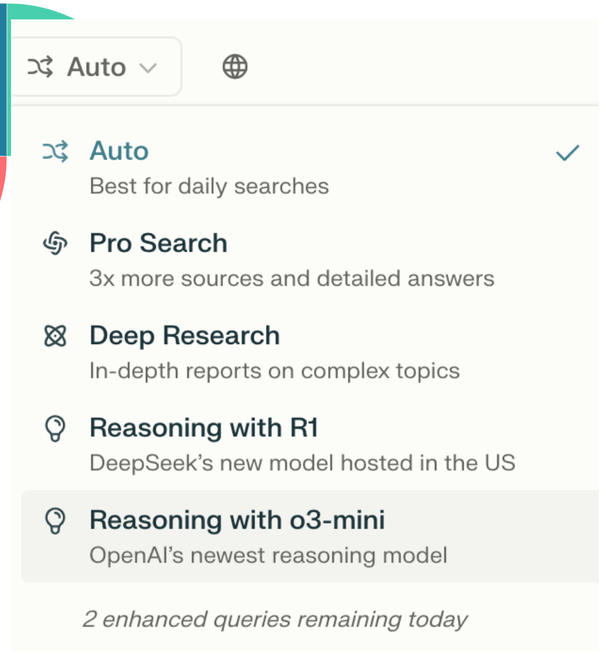


Prompt 2: “In my budget report Excel sheet, I want to highlight any expenditures that are over the budget. Could you explain how to apply conditional formatting to achieve this? I need a simple guide to follow.”

- **Goal:** To apply conditional formatting to highlight certain values.
- **Context:** The user is working on a budget report and wants to quickly identify expenditures that exceed the budget.
- **Source:** The user’s budget data is in an Excel sheet with columns for budgeted and actual expenditures.
- **Expectation:** The user expects instructions on how to use conditional formatting to highlight over-budget items.

Prompt 3: “I have yearly investment values in an Excel column and I need to calculate the compound annual growth rate over 5 years. Can you provide me with the Excel formula or function for this calculation? I’m looking for an easy-to-use solution.”

- **Goal:** To calculate the compound annual growth rate (CAGR) for an investment.
- **Context:** The user has a list of yearly investment values and wants to calculate the growth rate over a specific period.
- **Source:** The user’s investment data is listed in an Excel column with values for each year.
- **Expectation:** The user expects a formula or function that can be used in Excel to calculate CAGR.



Auto

•Adaptive model selection: The system intelligently switches between models like Sonar (default for standard searches) and reasoning-focused models (e.g., R1/O3-mini) for complex queries requiring deeper analysis[3][1].

•Context-aware processing: Determines whether to use quick summarization or in-depth research based on question complexity:

- Simple queries: Uses faster models for instant answers
- Multistep reasoning: Engages advanced models for comprehensive analysis[1]

Pro Search

Offers enhanced research and problem-solving capabilities[1]. It has been upgraded to tackle more complex queries, perform advanced math and programming computations, and deliver thoroughly researched answers[1].

1.Multi-step reasoning: It can approach intricate problems by breaking them down into smaller goals, working through them step-by-step, and synthesizing in-depth answers efficiently.

2.Advanced math and programming capabilities

3.Comprehensive research: Deep searches across the internet, providing more detailed and precise.

4.Source linking: It links to a broader range

Deep Research
Performs dozens of searches, reads hundreds of sources, and reasons through the material to autonomously deliver a detailed report[2][3].

1.Iterative approach: It refines its research plan, mimicking human research processes[1][3].
2.Extensive analysis
3.Time-saving: It completes tasks in 2-4 minutes.
4.Versatility: Excels at expert-level tasks across various fields, including finance, marketing, and product research.
5.Accessibility: with Pro subscribers getting unlimited queries and non-subscribers having access to a limited number of answers per day[3].
6.Export options: Users can export the final report as a PDF or share it as a Perplexity Page

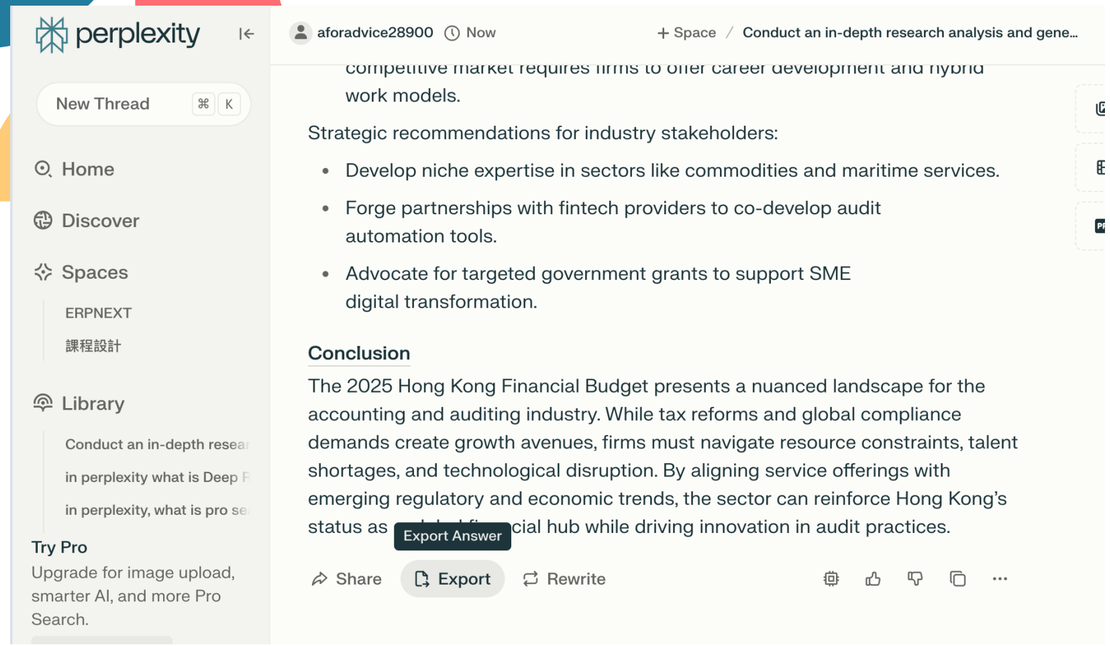
Please help me to refine the following into a prompt for perplexity to perform a deep research and generate a .pdf file: what is the impact of 2025 hong kong finance budget delivered in 2025 Feb to Hong Kong accounting and auditing industry?

Ask another AI e.g. Deepseek

deepseek

Prompt for Perplexity (with PDF output):

```
Conduct an in-depth research analysis and generate a comprehensive

Specifically, address the following aspects:

* **Policy Analysis:**
    * Analyze the key policy measures within the 2025 budget that
    * Identify any new regulations, tax changes, or funding initia
    * Evaluate the potential implications of these policies on the
* **Economic Impact:**
    * Assess how the overall economic projections and stimulus mea
    * Examine the potential impact on specific areas such as corpo
    * Analyze the impact to small and medium size accounting firm.
* **Technological Advancement:**
    * Investigate whether the budget includes any initiatives rela
    * Evaluate the potential for these initiatives to drive innova
* **Talent and Workforce:**
    * Analyze the budget's impact on the availability and developm
    * Consider any measures related to professional training, educ
* **Regulatory Changes:**
    * Investigate if any new regulatory changes are expected to be
* **Future Outlook:**
    * Provide a forward-looking assessment of the long-term implic
    * Identify potential challenges and opportunities for industry

Please ensure the PDF report includes:

* A clear and concise executive summary.
* Well-organized sections with headings and subheadings.
* Data and statistics from reliable sources, with proper citations
* Expert opinions and analysis from industry professionals.
* A conclusion section summarizing the key findings.

Generate the final output as a downloadable PDF document.
```



Policy Analysis: Strategic Measures Reshaping the Sector

Tax Relief and Compliance Adjustments

The Budget extends limited tax relief to businesses, including a 100% reduction in profits tax for the 2024/25 assessment year, capped at HK$1,500 per entity[1] [2]. While this provides marginal relief for small and medium-sized enterprises (SMEs), larger multinational enterprises (MNEs) face a global minimum tax rate of 15% under the OECD's Inclusive Framework, applicable to

Funding Initiatives for Global Expansion

A HK$1.5 billion injection into the BUD Fund and Export Marketing Fund aims to support SMEs in accessing mainland Chinese and overseas markets[1]. Accounting firms are well-positioned to assist clients in securing these grants, which cover up to 90% of project costs for non-profit

Real Estate and Stamp Duty Adjustments

The stamp duty exemption threshold for properties under HK$4 million[2] may increase transaction volumes in the lower-tier real estate market. Accounting firms with real estate clients will need to recalibrate tax planning strategies, particularly for stamp duty savings, while monitoring potential shifts in asset valuations.

Technological Advancement: Indirect Catalysts for Innovation

While the Budget allocates HK$1 billion to establish an AI research institute[1], direct funding for accounting-specific technologies like blockchain or data analytics remains absent. Nevertheless, the broader push for AI adoption in financial services could incentivize auditing firms to integrate

Reasoning with R1 refers to the integration of the DeepSeek-R1 reasoning model, which enhances the platform's analytical capabilities[1][2]. This feature allows users to leverage advanced AI-driven reasoning for more comprehensive and insightful search results[2].

1.Enhanced analysis: The R1 model considers multiple factors before delivering results, providing a more nuanced understanding of complex topics[2].

2.Improved decision-making: For queries requiring in-depth evaluation, such as financial analysis or career planning, R1 offers structured approaches to assess risks and rewards[2].

3.Efficient information processing: R1 can quickly analyze vast amounts of data from numerous sources, delivering concise and relevant insights[2].

4.Uncensored information: Perplexity has released R1 1776, a version of DeepSeek-R1 that has been post-trained to remove censorship while maintaining high reasoning capabilities[13].

5.Open-source availability: The R1 1776 model is available on platforms like Hugging Face,

Reasoning with o3-mini refers to the integration of OpenAI's latest advanced reasoning model into the platform's search and answer capabilities. This update, which occurred around February 1, 2025, replaced the previously used o1 model[15].

1. Enhanced performance: o3-mini outperforms its predecessor in areas such as math, coding, and science, while delivering faster responses[1].

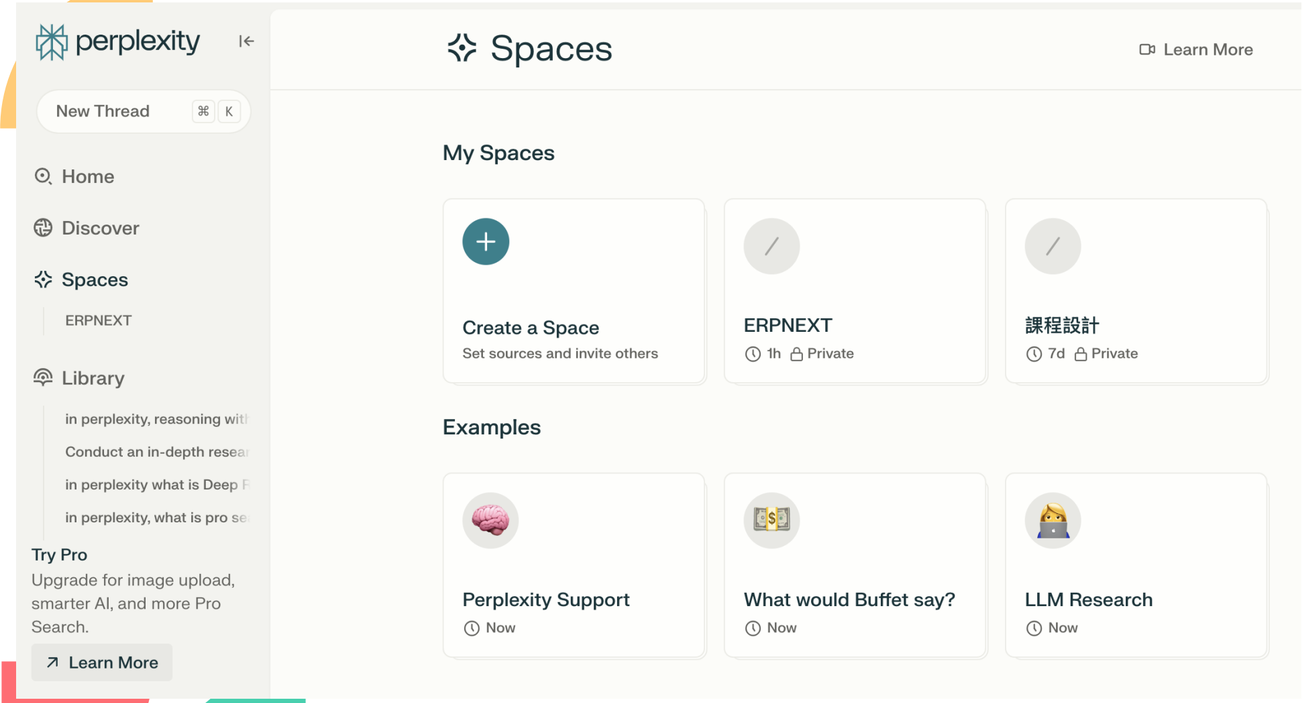
2.Cost efficiency: The model is 63% cheaper than o1-mini and 93% cheaper than the full o1 model, priced at $1.10/$4.40 per million tokens for input/output respectively[6].

3.Improved reasoning capabilities: o3-mini offers more accurate and clever answers with stronger reasoning abilities, resulting in a 39% reduction in major errors on difficult real-world questions[1].

4.Reasoning effort options: Users can choose between low, medium, and high reasoning effort levels, allowing for customization based on task complexity2.

5.Up-to-date information: The model can fetch current information from relevant web sources, enhancing its ability to provide timely and accurate responses2.

Try ask a .PDF tender document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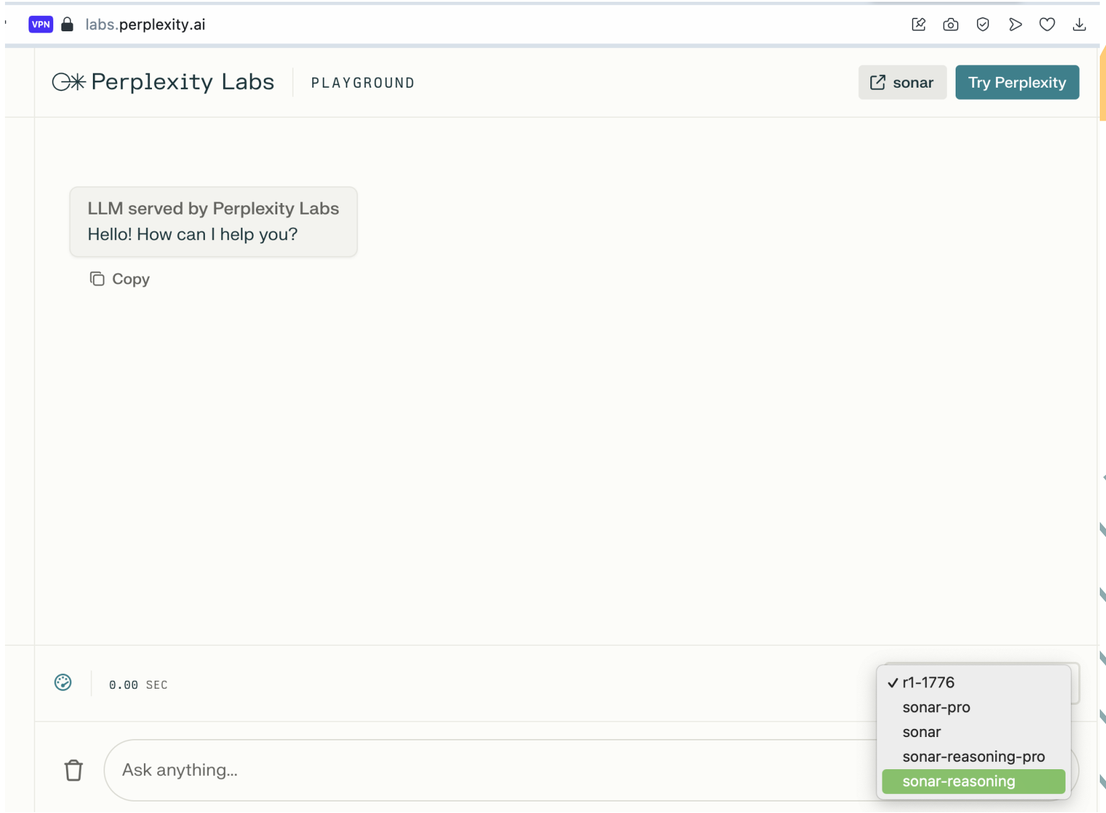
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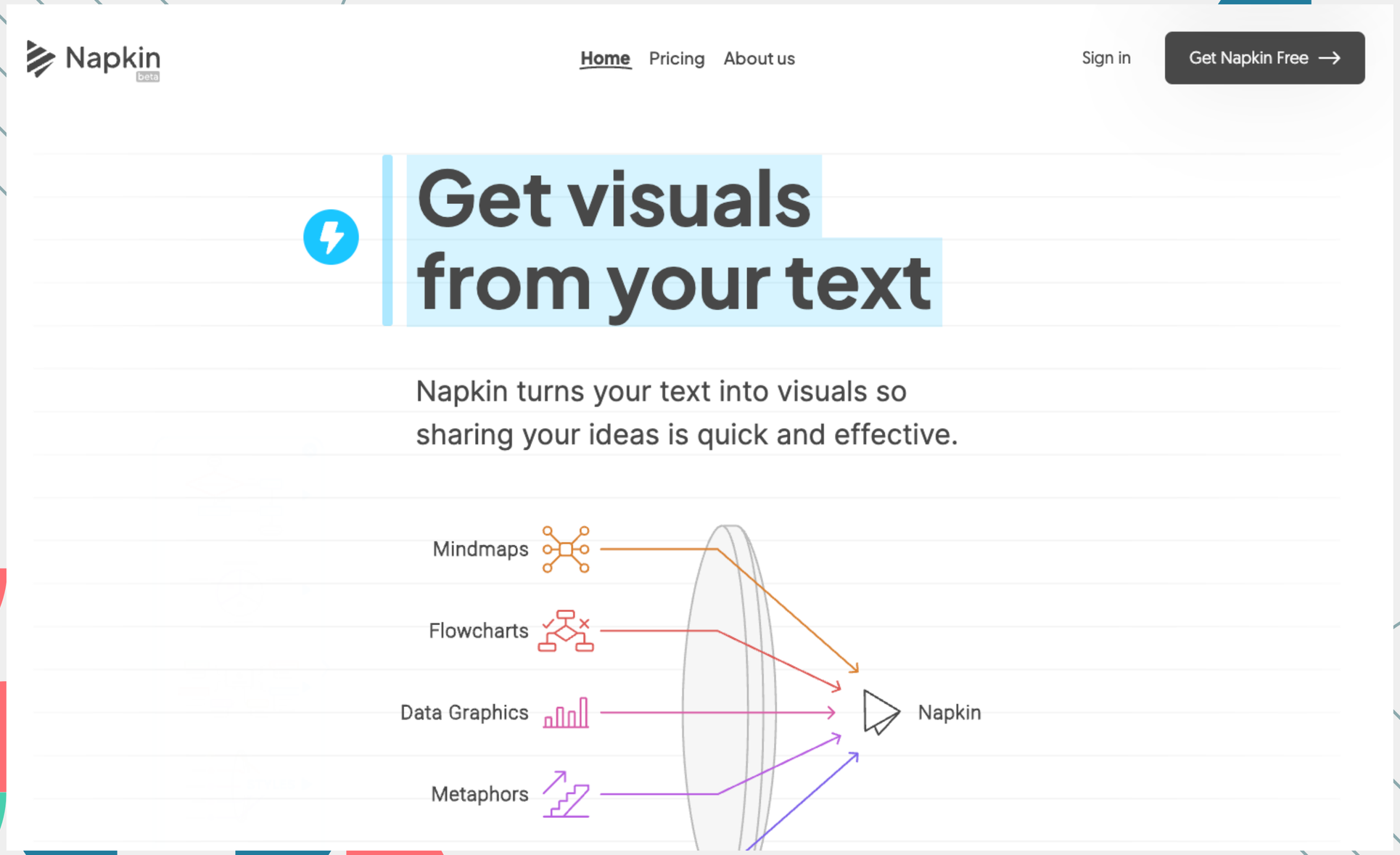
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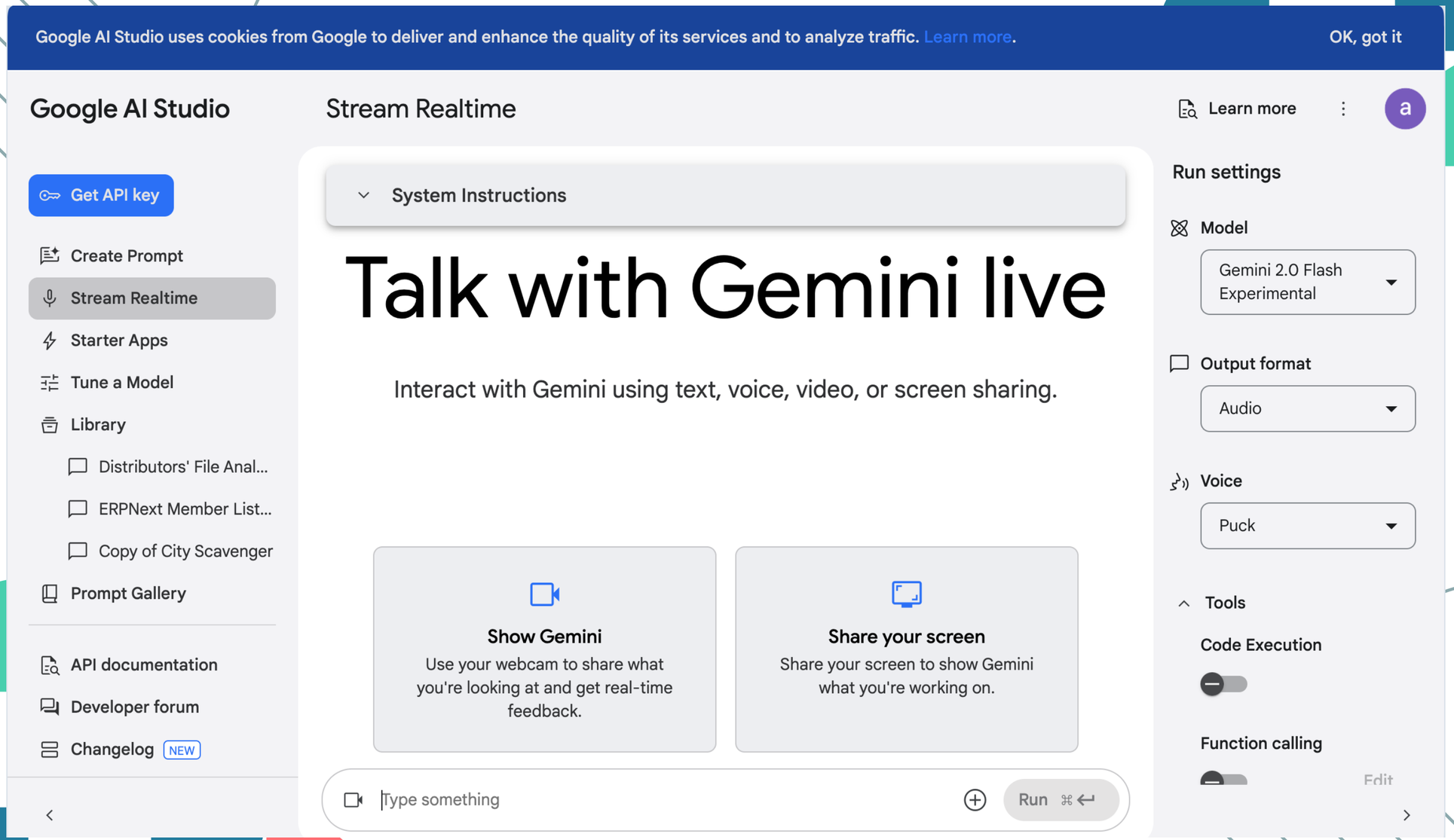

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