



TPF TIPS – APRIL, 2026

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Welcome to the new-look TPF TIPS monthly newsletter, where our mission is to *apply 35 years of experience to cut through the noise, unpack the jargon, and offer clear, digestible insights on the tax and financial topics that matter most to you.*

And...provide an inside look to some of our favorite anecdotes from our years as a company in the new, **35th Anniversary – Did You Know??** section of the newsletter.

Here we will share insider stories, successes and lessons learned in serving generations of clients. Hope you enjoy this special look into our history.

We know your time is precious and your inbox is sacred. We strive to make these emails a quick, valuable read (5–7 minutes) and plan to deliver them to you on or around the 15th of each month (a not-so-subliminal nod to that important day in tax season).

After all, **it's your money—we want to help you keep as much of it as possible!**

35th Anniversary – Did You Know?!

Back in the day technology. . .

In 1991, when the firm was a newcomer with a penchant for technology, we opened our doors with what was considered the "Ferrari" of office hardware: an IBM 386SX personal computer with 2MB of memory and a 40MB hard drive.

For those keeping score at home, your current iPhone is roughly 100,000 times more powerful than that entire system!

Back then, "saving a file" meant wrestling with a 3.5-inch floppy disk, and our "monitor" was a glowing, green, MS-DOS screen that doubled as a nightlight. We were also among the very first to adopt a little piece of software called Intuit QuickBooks (now an industry giant).

Being an early adopter back then sparked a "leading-edge" spirit that continues to drive the firm today. While the glowing, green, MS-DOS screens have since been replaced with secure cloud-based portals, the commitment to using the best tools for our clients' needs remains unchanged.

It's that time.....buckle up and let's get **savvy!!!**

The theme for this month is:

Artificial Intelligence (AI) – One Year Later.

From “What Is It?” to “Here’s How It’s Working in the Real World.”

Last April, we kept things simple in our discussion regarding AI.

We walked through what artificial intelligence is – math fueled by massive amounts of data and smart pattern-matching systems – used to power everything from Netflix recommendations to fraud detection protecting bank accounts.

Common myths—like a total global takeover by virtual robots—can be safely set aside (*although we kinda think this could eventually happen*).

The true promise of AI is a quiet shift toward making life easier and acting as a support system rather than a replacement for human judgment.

We compared AI to the calculator—something that handles the tedious work so professionals can focus on higher-value tasks. And, we concluded with an insightful quote from Marie Curie: *“Nothing in life is to be feared, it is only to be understood.”*

Twelve months later, the promise of “making life easier” has arrived. AI is not just a futuristic tool anymore. It is embedded in everyday life: traffic signals on your morning commute, the way big box stores order inventory, the healthcare app we use, even the way factories run during the night.

This issue of [TPF TIPS](#) explores how AI is showing up in the real world—highlighting its strengths, its current limitations, and the pitfalls to watch for.

Agentic AI: From Helpful Assistant to Autonomous Teammate

Remember when AI mostly summarized emails or suggested playlist songs? That was last so, last year. In 2026, “agentic” AI has stepped up. “Agentic” means these systems don’t just respond—they “do things” like plan steps, use tools, coordinate with other software, and finish multi-step jobs on their own.

The shift to “doing things” has happened so quickly because the platform models got better at “reasoning”—breaking big goals into small actions and learning from mistakes along the way. Early results show real productivity gains: faster operations, fewer errors, and people freed up for higher-value work.

But here’s the practical note for you: these agents still need clear rules and human oversight. They are reliable when the task is well-defined, but can go off-script if goals are vague.

Beyond the Data: Seeing, Hearing and Understanding the Whole Picture

Another big leap are AI systems that handle text, images, audio, and video all at once. The industry term is “multimodal AI”.

No more switching apps or explaining things in plain text. You can show it a photograph of a broken part, describe the problem out loud, and artificial intelligence will pull the specifications, recommend fixes, and even generate a repair video.

AI platforms from the big players like Meta, Google, Grok, and others now process entire documents, hours of video, or other complex data seamlessly into a complete solution.

In everyday life this shows up in smart phone assistants that understand your pictures, voice notes, and calendar together. In business it powers things like quality control on factory floors (cameras spot defects in real time) or customer service bots that analyze a customer call, a screen share session, and/or past emails to help raise the level of customer satisfaction.

AI in Daily Life: Already Part of the Routine

Most of us interact with artificial intelligence dozens of times a day without even thinking about it. Smart assistants schedule events in our calendar, adjust the thermostat in our home based on weather and habits, and even suggest meals from what's in our smart fridge!

AI companions—personalized apps that chat, remember preferences, and offer advice—are booming; hundreds have launched in the past year with millions of downloads.

Other areas of “routine life” in action: online stores use AI to predict what you'll want before you search, directions and traffic rerouting in GPS apps and tools that customer service agents use to help answer questions. – the upside is convenience and time saved.

The reality check?

These systems collect a great deal of personal data in order to work well. Most people are fine trading some privacy for usefulness, but it pays to know what you're sharing and review app permissions regularly.

What to Watch For

AI isn't perfect, and pretending it is would be bad advice. Here's what you should be on the lookout for:

Privacy and Data Security: AI platforms thrive on information. Make sure any tool in use has strong protections and clear policies on how data is stored or used.

- Bias and Fairness: AI learns from past data, so it can unintentionally reflect old patterns.

- Hallucinations and Errors: Even advanced AI models can confidently state wrong facts. Always verify important outputs. New self-verification features are helping, but human review remains essential.

- Job impacts: Some roles are shifting—routine tasks get automated, creating space for oversight, creativity, and complex problem-solving. The winning approach is the formation of “human-AI teams” where people focus on judgment and relationships.

Final Thoughts. . .

A year ago, AI felt like something to watch from a distance. Today it's woven into the very fabric of how the world runs—making operations smoother, decisions faster, and possibilities broader. Where will things be next year? Stay tuned!

Remember:

The “personal touch” is still the best for questions about how to best navigate new technologies, tax laws and legislative changes. We keep track of these things so you don't have to. If you have questions, please reach out.

After all, our main goal is *helping you keep as much of your money as possible.*

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