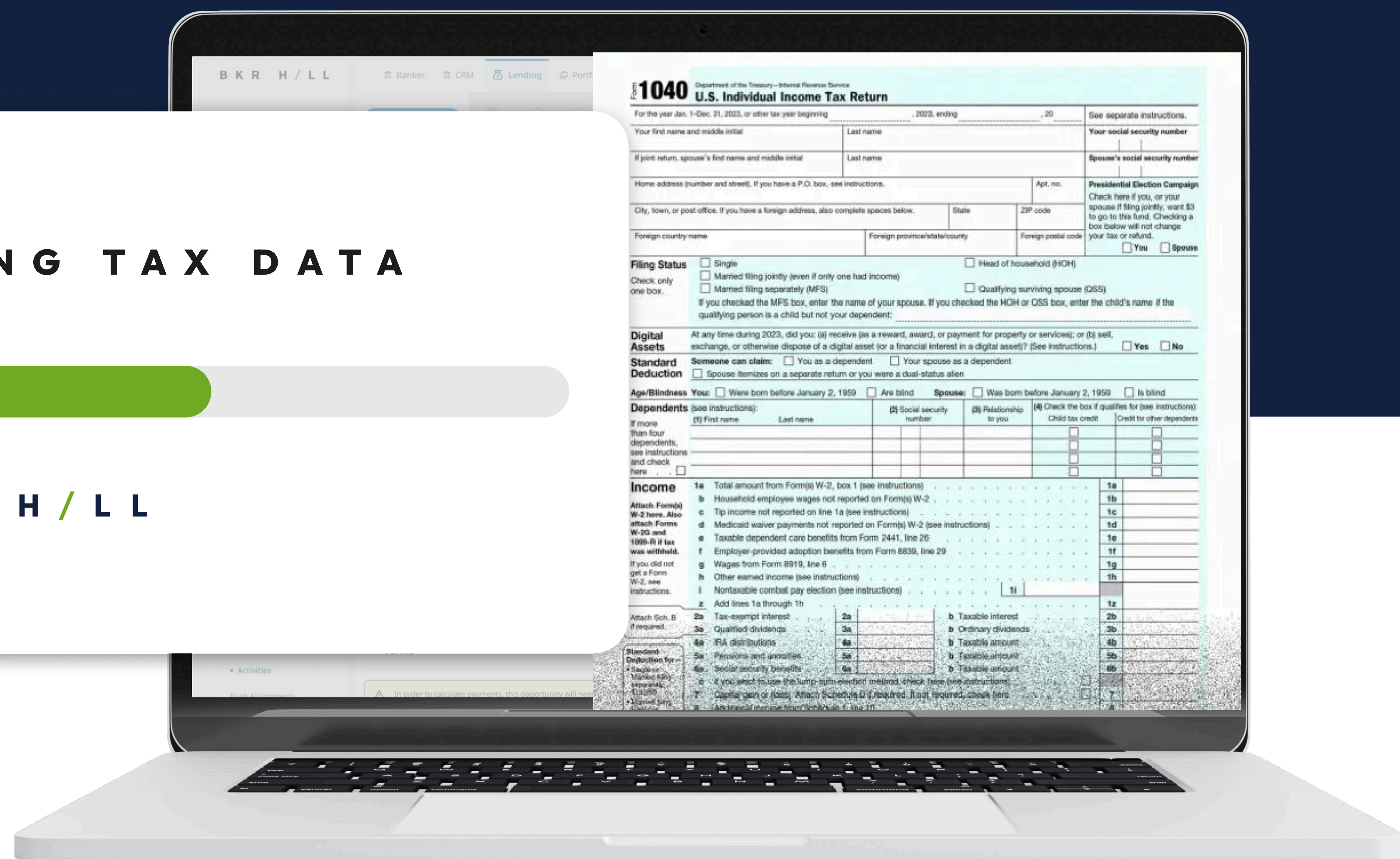


INTELLIGENT DOCUMENTS & DATA

From document intake to decision-ready insight — automatically.

EXTRACTING TAX DATA

powered by B K R H / L L



MAKE EVERY DOCUMENT WORK HARDER

Lending teams shouldn't have to chase data across PDFs, tax returns, and spreadsheets to get to a confident decision. Intelligent Documents & Data brings structure, accuracy, and speed to document-driven workflows — capturing critical financial information and delivering it directly into the Baker Hill platform so teams can analyze, validate, and move forward faster.

The result: less manual work, fewer errors, and more time focused on relationships and risk.

BUILT INTO THE WAY LENDERS WORK

Intelligent Documents & Data is embedded directly into Baker Hill workflows — so insights appear where decisions happen, not in disconnected tools. By automatically extracting and organizing financial data from U.S. business and personal tax forms, the solution helps teams move from intake to analysis with clarity and consistency.

Automated data capture

Powered by Microsoft Foundry AI and a single-tenant Cosmos DB architecture, we securely transform borrower documents into structured financial data — within a dedicated institution-specific AI environment.

Workflow-ready spreads and analysis

Captured data flows directly into spreads, which will flow to credit analysis, and loan origination workflows, ensuring teams start with accurate, structured information.

Consistent, reliable decision support

Standardized data improves accuracy across deals, helping institutions scale lending activity without increasing operational strain.

MORE THAN EXTRACTION — TRUE WORKFLOW INTELLIGENCE

Many tools stop at pulling data from documents. Intelligent Documents & Data goes further by embedding that data directly into the lending workflow — creating a connected, end-to-end experience that helps teams evaluate deals faster and with greater confidence.

Supported Documents (Current)

- Corporate tax returns (1120, 1120S, 1065)
- Personal tax returns (1040)
- Schedule L
- Schedule M-1/M-2
- Financial statements

Future Support (2026+)

- Additional unstructured documents and borrower materials

As document types expand, institutions gain a more complete view of borrower financials without adding manual effort.

Future Capabilities Include (2026+):

- ✓ Searchable document intelligence across workflows.
- ✓ Document summarization and financial insights.
- ✓ Query-based extraction for complex financials.
- ✓ Embedded intelligence that supports consistent underwriting.
- ✓ Trend and performance analysis across borrower data.

THE IMPACT

Efficiency up. Errors down. Confidence everywhere. With Intelligent Documents & Data, institutions can:

- Reduce time spent on manual document processing.
- Improve accuracy and consistency across spreads.
- Accelerate credit decision timelines.
- Increase throughput without adding headcount.
- Deliver a smoother experience for borrowers and teams.

BUILT FOR INSTITUTIONS THAT WANT TO MOVE FASTER

Modern lending demands speed, clarity, and consistency. Intelligent Documents & Data helps banks and credit unions streamline intake, strengthen analysis, and make confident decisions — without adding complexity to their operations.

Stronger data. Smarter decisions. Deeper relationships.
Partner with Baker Hill to experience Intelligent Docs & Data firsthand.

To learn more, visit: www.bakerhill.com/IDD

