

GrowWise Partners Prepares SR&ED Claims With an AI Agent That Interviews Clients in More Than Twenty Languages

Cardarelli Group publishes a case study on the platform it built for the Canadian SR&ED firm:

an AI agent that telephones the client and reconciles to the cent

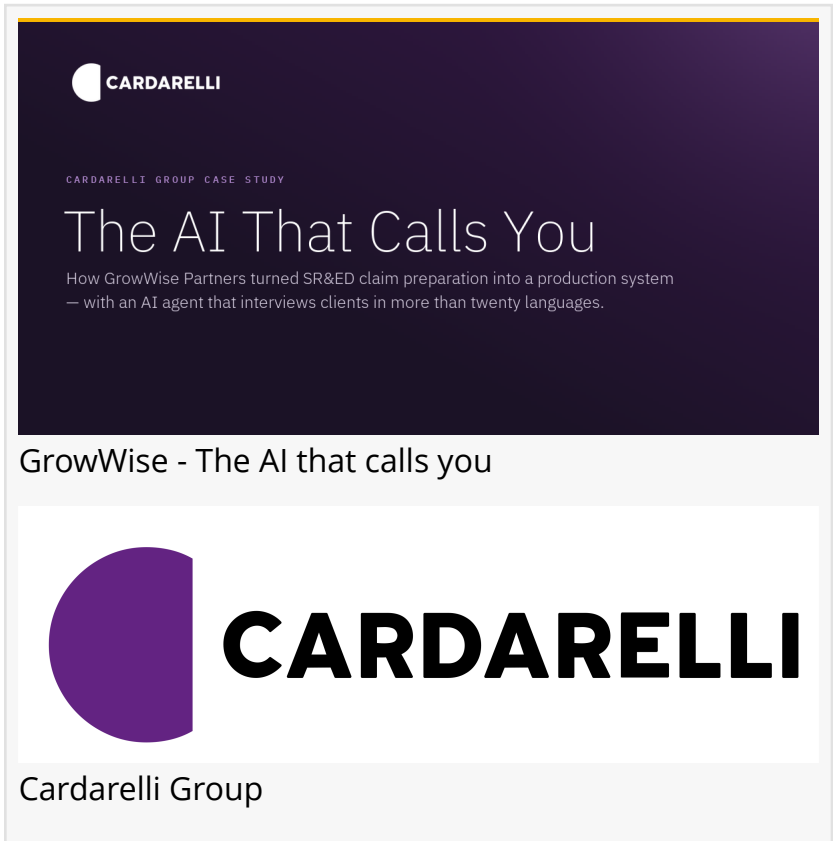
TORONTO, ONTARIO, CANADA,
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-- Cardarelli Group today published a case study on the SR&ED claim platform it built for GrowWise Partners, a consulting firm that prepares Canadian Scientific Research and Experimental Development tax credit claims. The platform's AI agent, Sam, telephones the client, interviews the engineer in one of more than twenty languages, and hands the consultant an English transcript. GrowWise serves more than 100 Canadian innovators

and has filed over \$20 million in claims, with 98% audit accuracy and under five hours of the client's time per claim, against the 20 to 40 hours the traditional process demands.

An SR&ED claim is three jobs at once. The company must describe each project's technological uncertainty, its systematic work, and its advancement on form T661, each under a hard word limit. It must apportion every salary, invoice, and asset to each project. And it must keep the evidence, because a CRA reviewer can ask for it two years after filing. Consultants spent their hours chasing engineers for interviews, re-keying invoices, reconciling payroll, and translating engineer-speak into the CRA's register.

The platform is built on one insight: SR&ED preparation is bottlenecked by information extraction, not tax expertise. The AI does the extraction. The consultant keeps the judgement. The split is written into the platform's own engineering guidelines. The AI is permissive — it casts



The graphic is a dark purple rectangle with a thin yellow border at the top. In the top left corner is the Cardarelli logo, a white semi-circle next to the word "CARDARELLI" in white. Below the logo, in small white capital letters, is "CARDARELLI GROUP CASE STUDY". The main title "The AI That Calls You" is in large white serif font. Below it, in smaller white sans-serif font, is the subtitle: "How GrowWise Partners turned SR&ED claim preparation into a production system — with an AI agent that interviews clients in more than twenty languages." Below the purple rectangle, the text "GrowWise - The AI that calls you" is in a dark grey sans-serif font. Below that is a white rectangle containing the Cardarelli logo (a purple semi-circle) and the word "CARDARELLI" in large, bold, black sans-serif font. At the bottom of the white rectangle, the text "Cardarelli Group" is in a dark grey sans-serif font.

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CARDARELLI GROUP CASE STUDY

The AI That Calls You

How GrowWise Partners turned SR&ED claim preparation into a production system
— with an AI agent that interviews clients in more than twenty languages.

GrowWise - The AI that calls you

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a wide net and captures anything that might qualify. The human expert is strict — a qualified consultant applies the SR&ED criteria and filters. The AI proposes. The expert disposes.

"The AI casts the net. Our consultants make the judgement calls. That division is why I can stand behind every claim we file," said Garron Helman, Co-Founder of GrowWise Partners.

Most tax software sends a questionnaire. Sam acts. It places its own call at the scheduled time, retries on no answer, and pauses and resumes an interview across days without losing the thread. It interviews in more than twenty languages, from French and Mandarin to Punjabi, Persian, and Ukrainian. The client's transcript and the consultant's English transcript sit side by side. The engineer best able to explain a technological uncertainty is interviewed in their own language, and the narrative does not get thinner for it.

Sam also does the typing. It reads invoices and T4 slips and drafts the entries. A person confirms every match before it counts; a fuzzy match is a suggestion, never an assignment. Social Insurance Numbers are deleted before Sam reads a slip. Every project document and completed interview becomes searchable evidence on its own, so the answer to a reviewer's question is a property of the claim, not a memory.

The financial engine carries the current federal and provincial rules, each mapped in writing to its legislative source. The labour allocation export, the filing file, and the accrual report share one calculation and agree to the cent. A claim cannot be filed incomplete. The platform blocks it.

Version 3.4.6 reached production on August 15, 2026 — the seventeenth version in 141 days, on 1,797 commits, a release about every nine days. Each release converted a manual consultant task into an automated one. Voice arrived, then gained multilingual recovery and pause-resume. Invoice extraction arrived, then gained approval gating. Narrative generation arrived, then gained word-limit enforcement.

"Seventeen releases in five months, and the exports still reconcile to the cent. That combination is the whole story," Helman said.

"GrowWise did not want a chat window. They wanted the story out of the engineer's head, in the engineer's language, with a consultant's judgement on every line," said Julian Cardarelli, Chief Executive Officer of Cardarelli Group. "We built the extraction and left the judgement where it belongs."

The full case study is available at <https://www.cardarelligroup.com/case-studies/growwise-sred-platform>.

About GrowWise Partners

GrowWise Partners prepares SR&ED and related tax credit claims for Canadian companies —

more than

100 innovators served, over \$20 million filed, 98% audit accuracy, under five hours of client time

per claim, at a contingency fee under 20 percent. growwise.ai

About Cardarelli Group

Cardarelli Group is a group of companies building artificial intelligence for government, financial

services, and law, operating across the United States, Canada, and the United Kingdom. The group

owns GovCore, a leading provider of regulatory technology to government — regulatory bodies across

the United States and Canada run their licensing, enforcement, and operations on it.

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