

The AI workspace for life admin.

Turn files and inbox documents into understanding,
action, memory, and proof.

PILOT PRODUCT

WEB + IOS

PRIVATE BY DEFAULT

ClearDesk

LIFE-ADMIN GRAPH

Paperwork is not a file problem.

It is unfinished work.

WHAT IS THIS?

————— A letter arrives without a clear explanation.

01

WHAT MATTERS?

————— The amount, deadline, sender, and action are buried.

02

WHAT NEXT?

————— The reminder, helper, and proof live somewhere else.

03

Every existing tool drops part of the lifecycle.

01

Storage

The file is saved.
The obligation is not.

LOSES THE ACTION

02

Tasks

The reminder exists.
The original context does not.

LOSES THE EVIDENCE

03

AI chat

The answer appears.
The lifecycle disappears.

LOSES THE MEMORY

One private workspace keeps the whole job together.



THE RECORD CONTINUES AFTER THE ANSWER

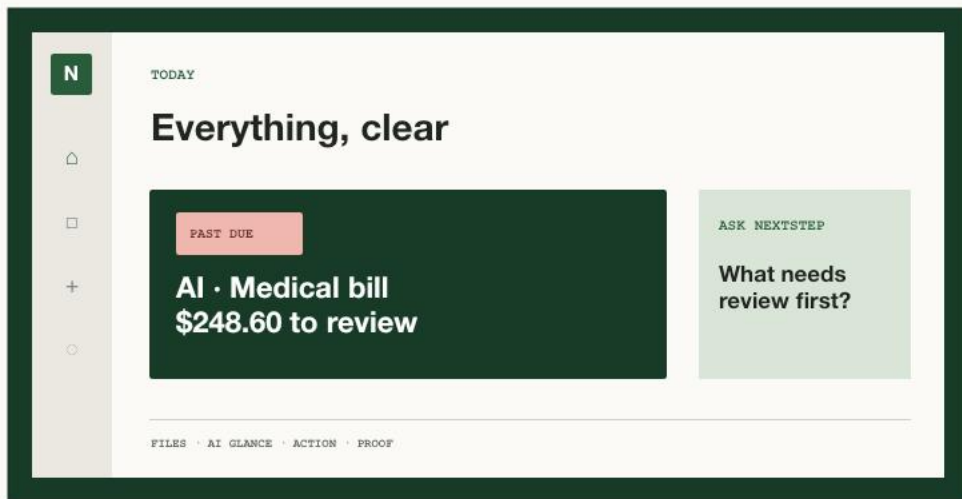
From “I’ll deal with it later” to handled.



ONE CONTINUOUS RECORD

A complete cross-platform system already exists.

Web + iOS, private storage, grounded AI, and durable follow-through.



- | | | |
|----|-------------------|-----------------------------|
| 01 | ORGANIZE | Folders, pins, tags, search |
| 02 | GLANCE | One-line AI file summaries |
| 03 | UNDERSTAND | Typed facts + guardrails |
| 04 | VERIFY | Evidence + human review |
| 05 | ACT | Reminder, calendar, helper |
| 06 | RETAIN | History + handled proof |

An assistant should show its work.

Evidence first. Confidence visible. Human confirmation when risk is high.

ASK THIS DOCUMENT

Do I need to pay this now?

The document shows \$248.60 due on 12 July. Because that date appears to have passed, verify the balance before paying.

01 "TOTAL PATIENT RESPONSIBILITY: \$248.60"

02 "PAYMENT DUE: 12 JULY"

1

SCOPE

One file or a chosen set

2

CITE

Facts point back to evidence

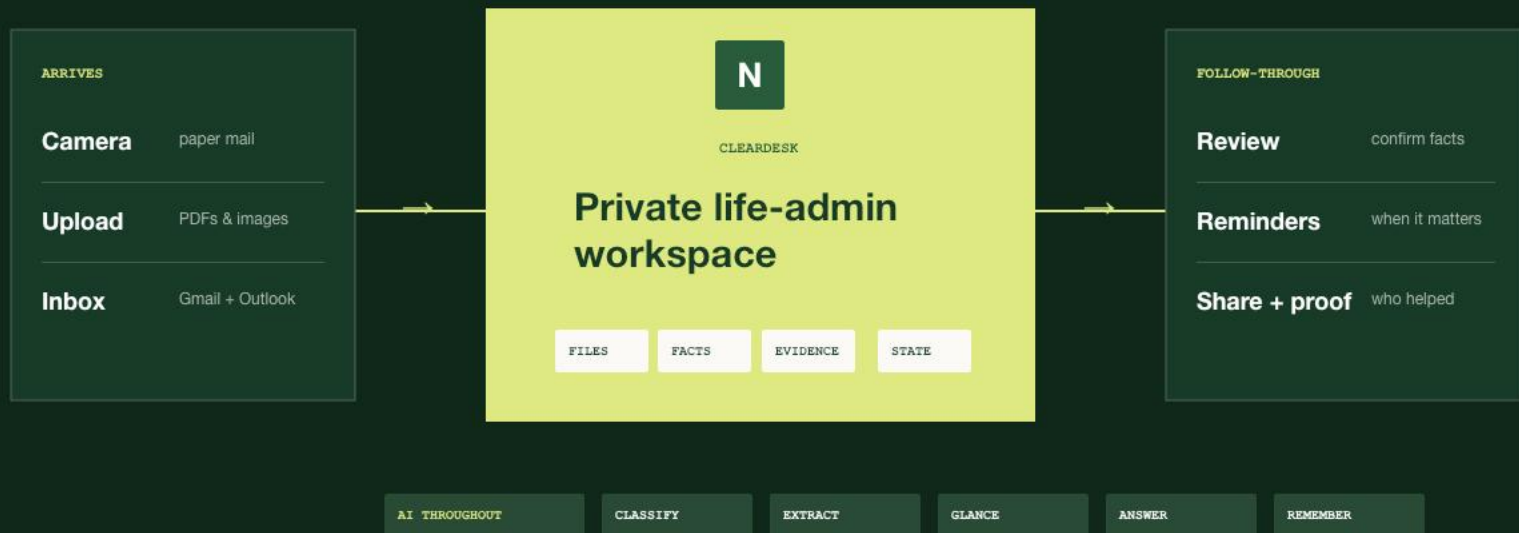
3

CONFIRM

Risky fields return to the user

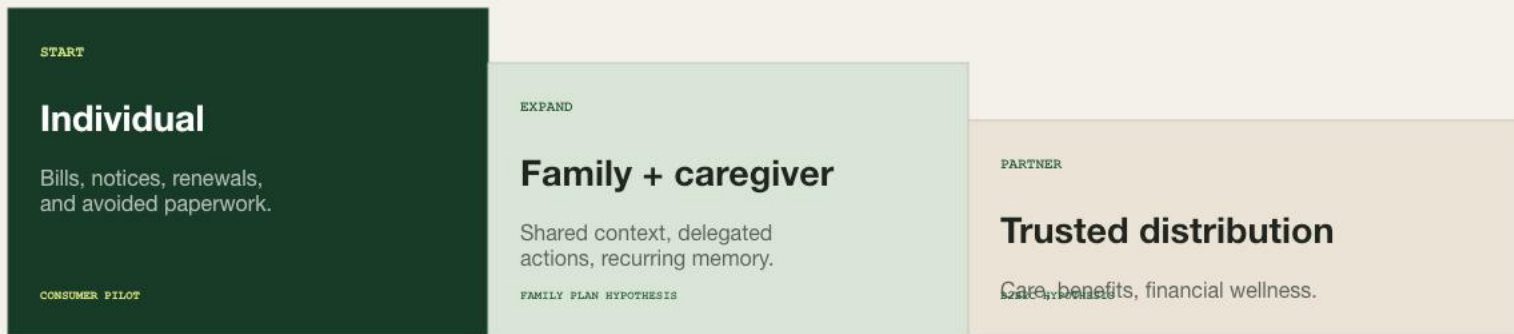
TRUST IS A PRODUCT BEHAVIOR

One life-admin graph, across every surface.



Start with one person's confusing document.

Expand only after the product earns trust through repeated follow-through.



TRUST

A universal behavior with urgent early users.

134.8M

U.S. households

FRED / U.S. CENSUS · 2025

91%

**U.S. adults own a
smartphone**

PEW RESEARCH · 2025

63M

**Americans provide family
care**

AARP / NAC · 2025

NextStep does not need every household on day one. It needs a narrow group with frequent, consequential, document-driven work.

A consumer trust relationship. Partner distribution over time.

VALIDATE IN PILOT — NO PRICING CLAIMED

CORE

Individual

Personal workspace, AI understanding, reminders, and history.

CONSUMER SUBSCRIPTION

NETWORK

Family + caregiver

Shared context, delegated actions, helpers, and household memory.

FAMILY PLAN

DISTRIBUTION

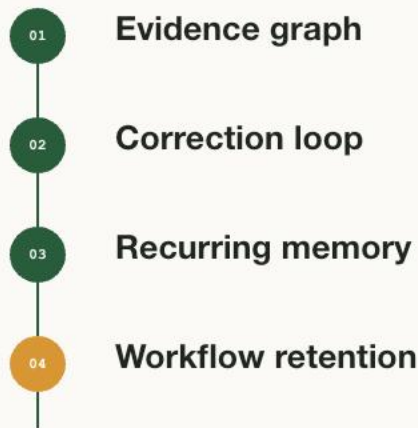
Partner

Benefits, caregiving, financial wellness, and trusted-service workflows.

B2B2C PARTNERSHIP

The durable asset is life-admin memory.

Each completed loop makes the next obligation easier to understand and finish.



Every fact stays connected to its document and review state.

Confirmations improve trust, context, and future extraction.

Senders, deadlines, amounts, and patterns become longitudinal.

Value continues through reminders, helpers, and proof.

COMPOUNDING CONTEXT, NOT A STATIC ARCHIVE

Web and iOS share one safety contract.

Private storage, owner-scoped RLS, server-side provider routing, and reviewable output.



Build the default workspace for the unfinished work of everyday life.

ACTIVATION

CONNECTED INBOX

HANDLED RATE

REPEAT USE

PAID INTENT

THE NORTH STAR

Action
completed.

PROOF RETAINED

NextStep · Life admin, made clear.

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