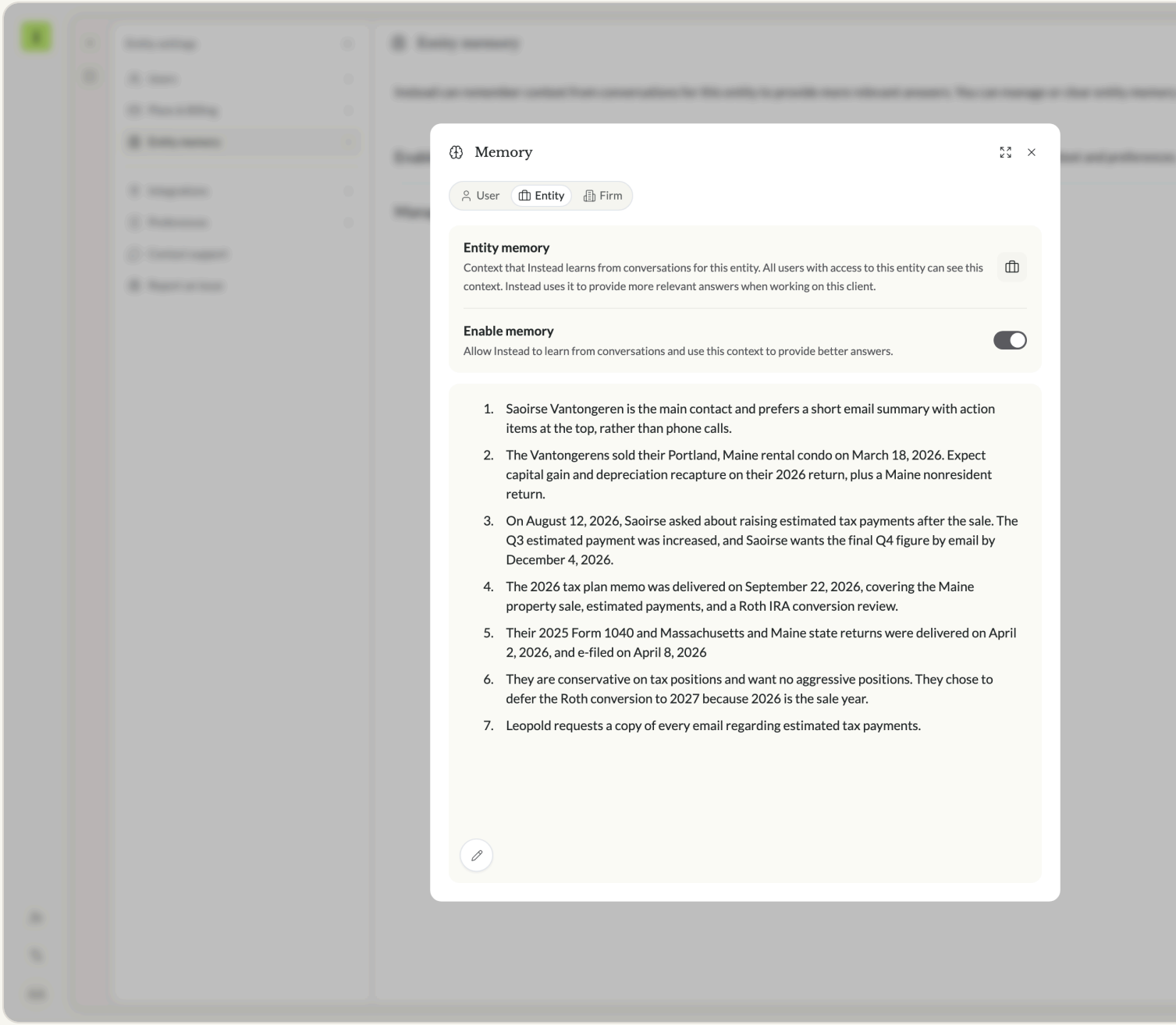
instead

WHITE PAPER

Instead remembers every client

October 2026

instead.com



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INTRODUCTION

Tell it once, and every chat about that client starts with it.

This paper shows how memory works in Instead at the firm, user and client level, what is worth keeping for each client, and one worked example on a demo client. It is written for firm owners, tax partners and the reviewers who sign off on the work.

01

Summary

Instead remembers every client.

You know things about each client that no form will tell you. How they like to hear from you. The rental they sold in March. The question they asked in August. The plan memo you sent. When the return went out. How much risk they will take.

Instead keeps that in client memory. Every chat about that client starts with it. Memory also holds your firm's procedures and your own preferences.

You can read it any time, correct one line, or tell Instead what to remember or forget. You can pause it or reset it.

THE WORKED EXAMPLE

The ask	"Draft a reply to Saoirse on their Q4 estimate."
The result	It put the action item up top, as she prefers. It planned around the March sale and the Q3 raise, and kept it conservative. With no 2026 numbers on file, it left the amounts as placeholders and said so.

Every draft from the agent is for your professional review.

02

Three kinds of memory

Memory for your firm, for you and for each client.

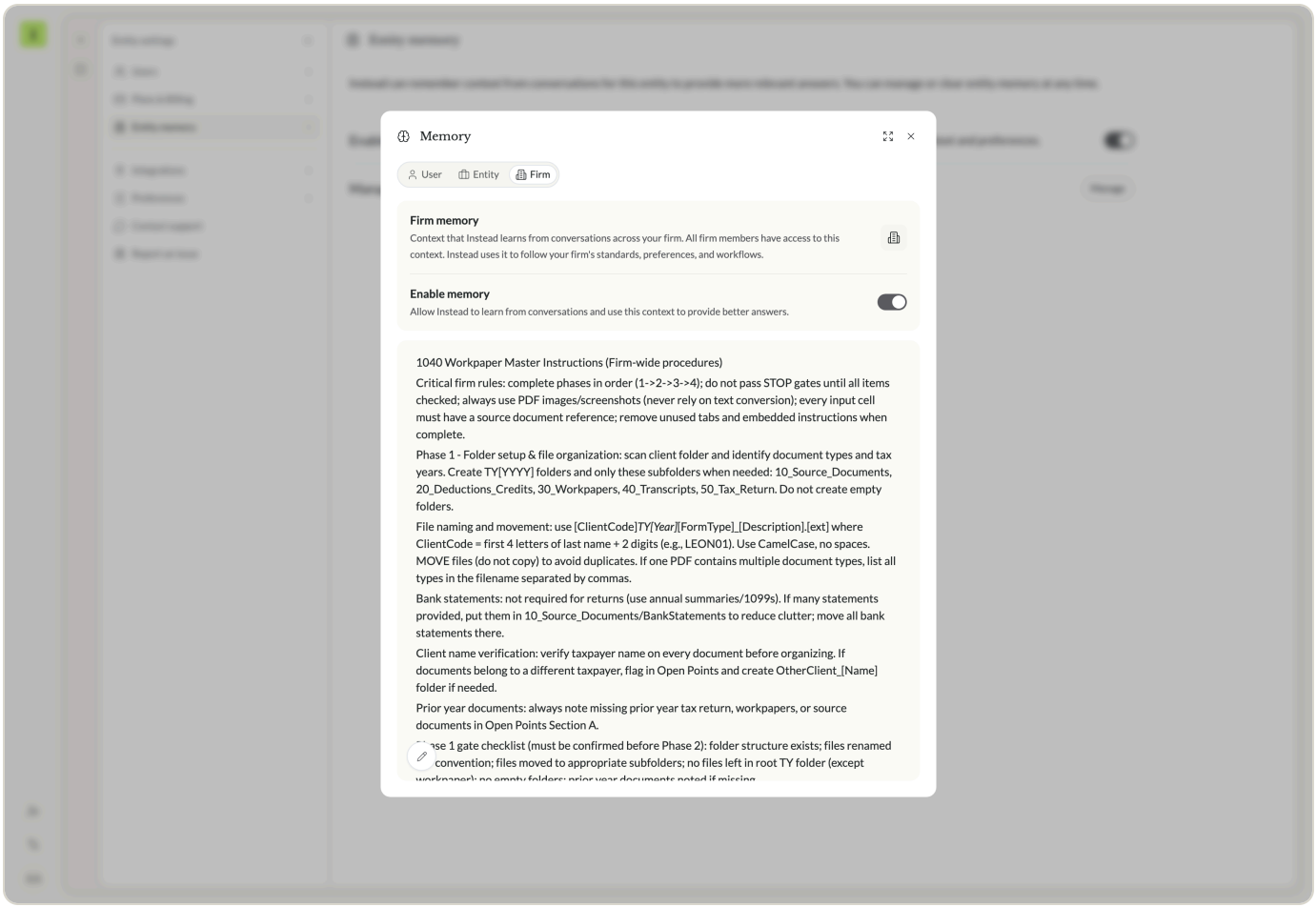
Firm memory	“Context that Instead learns from conversations across your firm. All firm members have access to this context. Instead uses it to follow your firm’s standards, preferences, and workflows.”
User memory	Memory for you. It holds your own preferences.
Client memory	Called Entity memory in the app. “All users with access to this entity can see this context. Instead uses it to provide more relevant answers when working on this client.”

Each memory is one document you can read, with its own Enable memory switch. Every conversation loads the memory that applies. A chat about a client starts with firm memory, your memory and that client’s memory.

Client memory is under the client menu, then Entity settings, then Entity memory, then Manage. Firm memory and User memory sit in firm settings.

Your firm’s way, too.

Figure 1 Firm memory. The Memory dialog on the Firm tab, with the firm’s 1040 workpaper procedures.



03

What Instead remembers about a client

Six kinds of things are worth keeping for every client.

Here is a demo client, Leopold & Saoirse Vantongeren, in a Sandbox demo firm. One memory line for each kind, as Instead shows it.

Preferences	"Saoirse Vantongeren is the main contact and prefers a short email summary with action items at the top, rather than phone calls."
Life events that change their taxes	"The Vantongerens sold their Portland, Maine rental condo on March 18, 2026. Expect capital gain and depreciation recapture on their 2026 return, plus a Maine nonresident return."
Questions they asked	"On August 12, 2026, Saoirse asked about raising estimated tax payments after the sale. The Q3 estimated payment was increased, and Saoirse wants the final Q4 figure by email by December 4, 2026."
Plans and memos you sent	"The 2026 tax plan memo was delivered on September 22, 2026, covering the Maine property sale, estimated payments, and a Roth IRA conversion review."
Returns delivered	"Their 2025 Form 1040 and Massachusetts and Maine state returns were delivered on April 2, 2026, and e-filed on April 8, 2026"
Risk tolerance and decisions	"They are conservative on tax positions and want no aggressive positions. They chose to defer the Roth conversion to 2027 because 2026 is the sale year."

A seventh line came later, when we told Instead one more thing. See section 05.

04

Worked example, a Q4 estimate email

It already knows the client.

In a new client thread we asked “Draft a reply to Saoirse on their Q4 estimate.” The prompt did not mention her preferences, the sale or the August question.

The agent wrote that the client notes put the condo sale on March 18, 2026, that Q3 estimates were already raised, and that Saoirse wants the final Q4 number by email in early December. It said it did not have the 2026 numbers on file, and asked how to handle the amount. We chose Placeholder draft now.

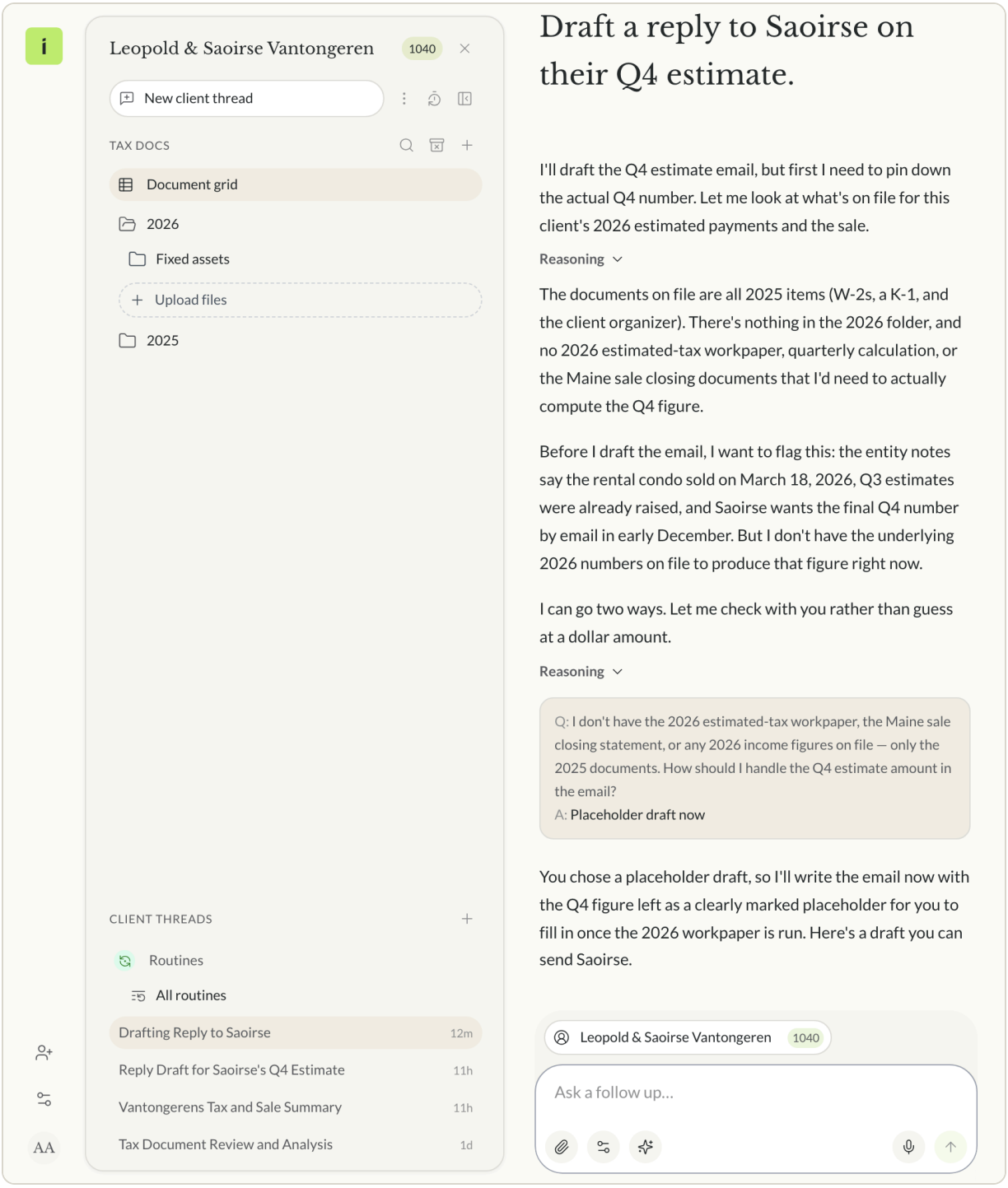
The draft follows what it remembers.

It put the action item up top, as she prefers. It planned around the March sale and the Q3 raise, and kept it conservative. With no 2026 numbers on file, it left the amounts as placeholders and said so.

From the draft. “Here’s the summary and action item up top, as you prefer.” “As always, we’ve kept this conservative with no aggressive positions.” “I know email works best for you.”

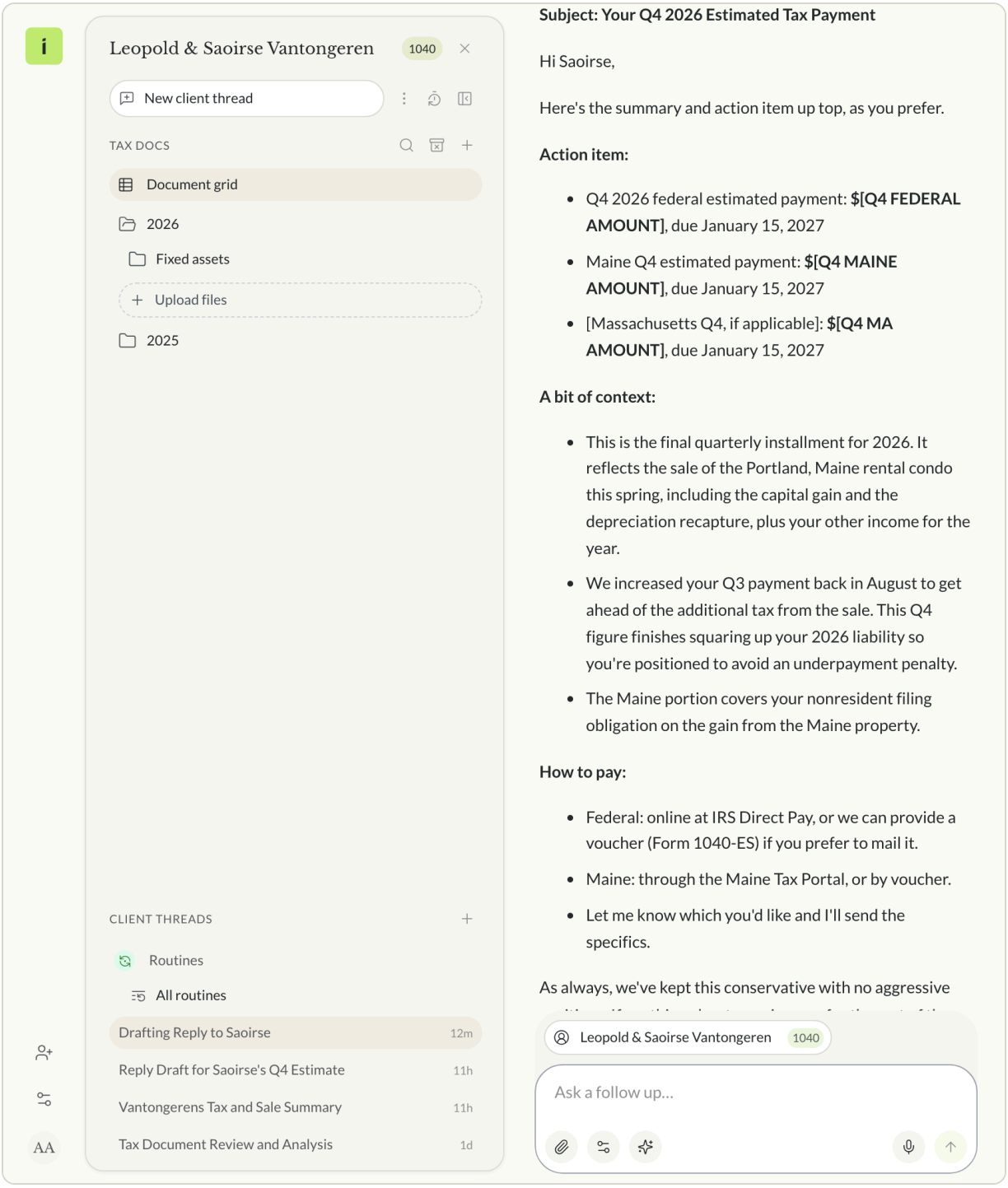
The agent starts from client memory.

Figure 2 The agent starts from client memory. It names the sale, the Q3 raise and the December request, then asks about the amount.



The draft follows what it remembers.

Figure 3 The draft. Action item first, due dates of January 15, 2027 as the agent wrote them, amounts left as placeholders.



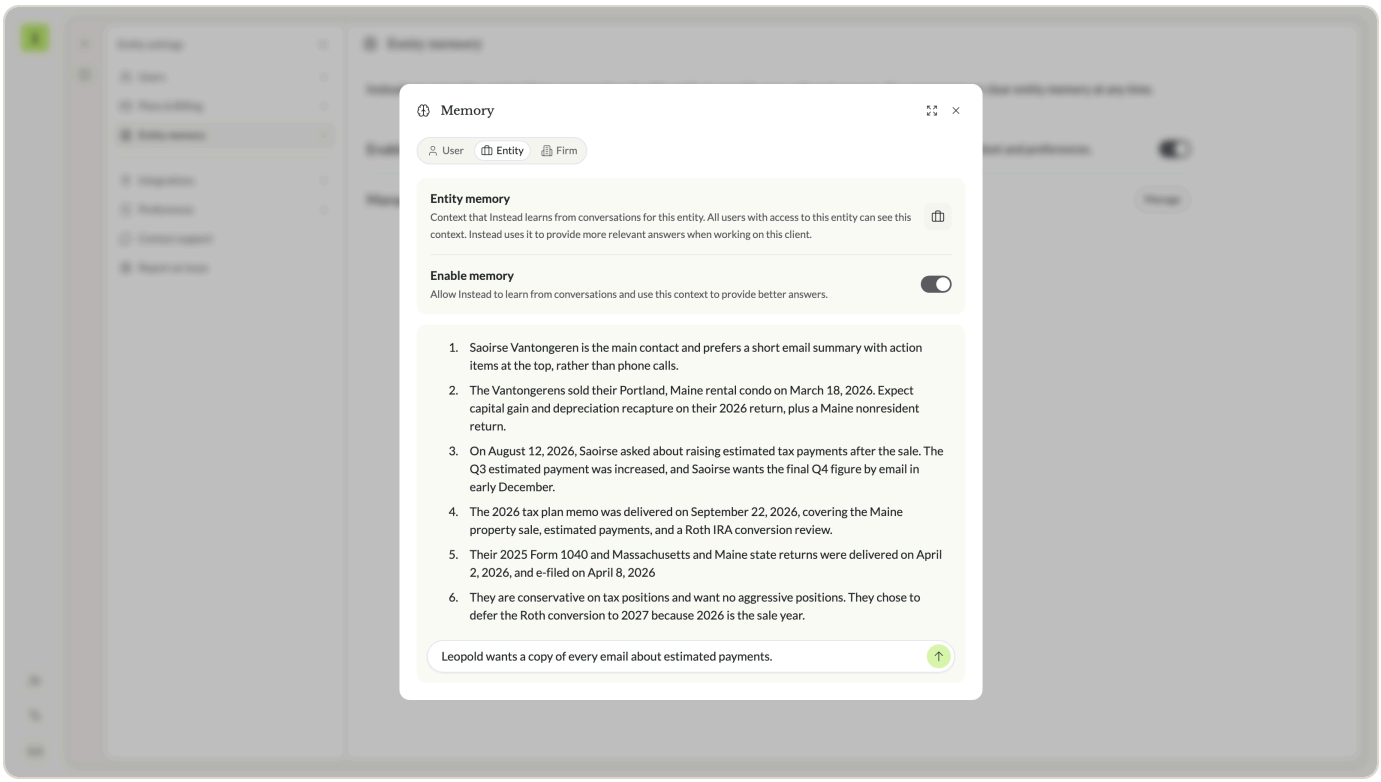
05

Tell it once, correct one line

Tell it once.

After the draft, we typed in the Memory dialog bar “Leopold wants a copy of every email about estimated payments.” Instead saved a new line. “Leopold requests a copy of every email regarding estimated tax payments.”

Figure 4 Tell Instead what to remember or forget. The instruction typed in the bar, before it was sent.

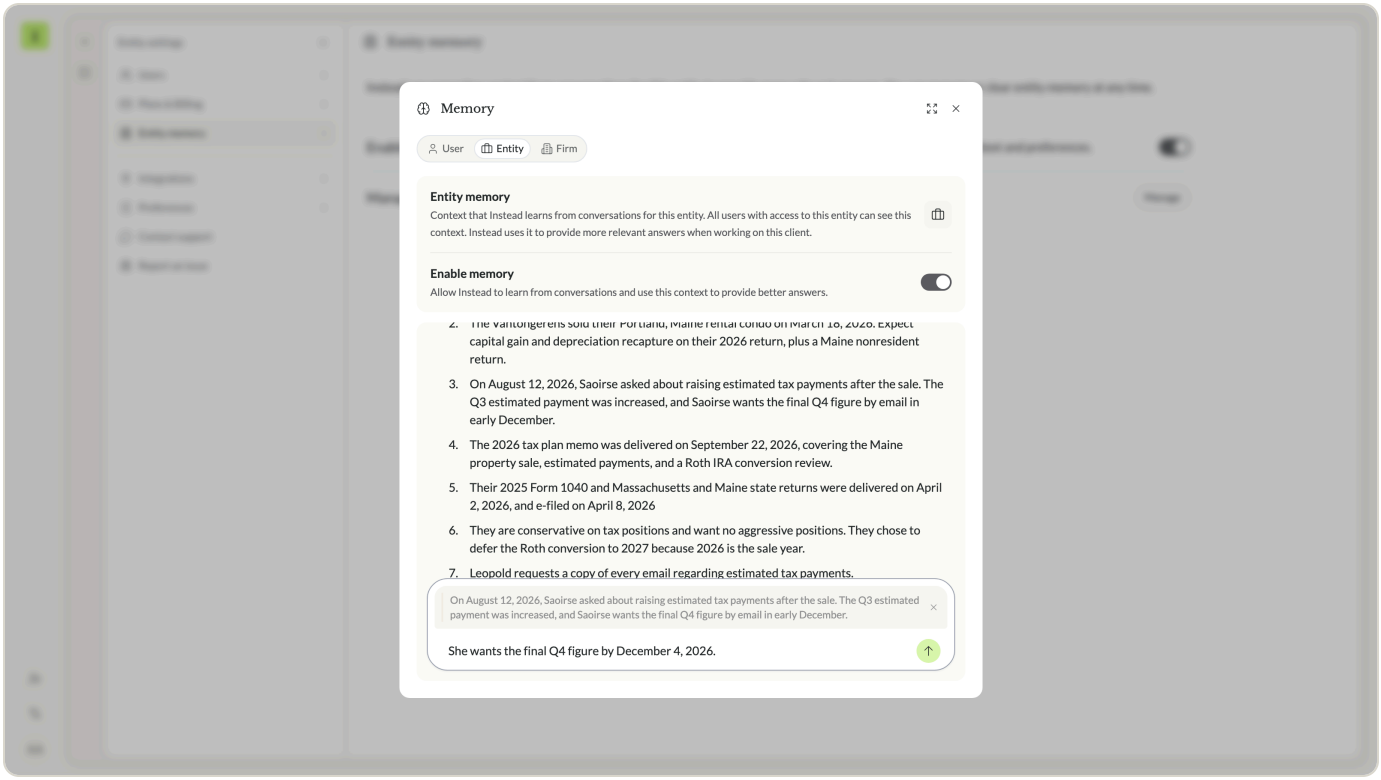


05

Correct one line.

We highlighted line 3, chose Make a correction and typed “She wants the final Q4 figure by December 4, 2026.” Only that line changed. It now ends “by email by December 4, 2026.”

Figure 5 Make a correction. The highlighted line is quoted in the box, with the fix typed below it.



06

Controls

Read it, correct it, pause it or reset it.

Manage	Opens the Memory dialog with the whole document. Tabs for User, Entity and Firm in the client view.
Instruction bar	Click the pencil. “Tell Instead what to remember or forget about this entity”, in your own words.
Make a correction	Highlight a passage and type the fix. Only that passage changes, and the dialog shows what changed.
Enable memory	One switch for each memory. “Allow Instead to learn from conversations and use this context to provide better answers.”
Pause memory	“Instead keeps its existing memory but won’t use memory or make new memories.”
Reset memory	“This will permanently delete all memories. This can’t be undone.”

Pause memory and Reset memory are the two choices when you turn Enable memory off.

07

Use cases by practice area

What you can keep, by the kind of work.

These are ideas, not templates. Only the Vantongeren example was run for this paper.

1040 households	You can keep who the main contact is, which spouse signs, a home or rental sale, a new child, and the documents that always arrive late.
Business entities	You can keep the accounting method, the states the entity files in, the ownership split and elections the owners made.
Tax planning	You can keep the plan memo you delivered, the decisions the client made, what they deferred and why, and how much risk they will take.
Notices and resolution	You can keep which notice arrived, what you sent back and when, and what you told the client about the next step.
Client communication	You can keep how each client likes to hear from you, who gets a copy, and the dates you promised.

Tell it once, and every chat about that client starts with it.

08

How other assistants describe memory

General AI assistants have memory too.

This is how each one describes it, from public pages we read on October 23, 2026.

ChatGPT.
OpenAI's help article Memory in ChatGPT says ChatGPT can remember relevant preferences and details from your chats. You can review a memory summary and correct it, including by highlighting text. When we read it, the page said it was updated the day before.

Claude.
Anthropic's post Bringing memory to Claude (September 11, 2025, updated October 23, 2025) says Claude remembers your team's processes, client needs, project details and priorities. Each project has its own memory, and you can view and edit what Claude remembers. Its help article on chat search and memory was updated October 21, 2026.

Instead.
Memory belongs to each client in your firm's client list, next to that client's documents and threads. Everyone with access to that client sees the same memory, and every chat about that client starts with it.

09

What it does not do

Memory gives the agent context. You keep the judgment.

No edit history or undo.
The memory screens do not show past versions. Reset memory can’t be undone.

No memory in the public API.
The Instead API has no memory endpoints today. You read and change memory in the app.

Not a workpaper.
In the example, memory had the dates and decisions, not the 2026 numbers. The draft used placeholders and said so.

A draft for review.
Every draft, answer or plan from the agent is for your professional review.

Read it any time. Correct one line.

instead

Memory in Instead

Memory for your firm, for you and for each client. Read it any time. Correct one line. Or tell Instead what to remember or forget.

To start, open a client, then Entity settings, then Entity memory, then Manage. Read what Instead keeps. Tell it what to remember or forget, and correct any line.

Get started with memory in Instead

Start your trial at instead.com