



Firm AI Search

Ask “what has
our firm done...”
Get answers instantly.

Natural language search capabilities
in Lito extract matter intelligence from
Foundation directly into the tools lawyers use
every day.



Your Firm's Collective Intelligence, At Your Fingertips

Every pitch, proposal, and client conversation starts with one question: **“What have we done in this area before?”** Foundation has the answer, but not everyone regularly accesses it. Attorneys drafting in Word or replying in Outlook need the same experience data business development and knowledge teams curate—without switching systems or waiting for someone else to pull it.

Built on 30 years of legal-specific intelligence, Lito delivers data and intelligence across the business and practice of law, wherever lawyers already work. With **Firm AI Search**, Lito responds to complex questions and surfaces your firm's collective knowledge and experience, sourced directly from Foundation.

Available to anyone in your firm with access to Foundation and Lito, Firm AI Search allows Foundation power-users to respond to client requests by surfacing information faster, while also granting attorneys and other client-facing teams access to the firm's experience without leaving the tools they use daily.

Natural-Language Discovery

Just ask: “What have we done...” and Lito searches your firm's experience data and returns a trusted, cited summary or table.

No Question Too Complex

Combine attributes across matters, clients, and people in one query: “M&A deals for banking clients in North America.”

Meets You Where You Work

Available on the web, Outlook and Word, with mobile as a fast follow. Get results in moments without leaving your workflow.



What You Can Search

Query your firm's experience in plain language across a growing set of Foundation fields, including predefined and custom fields.

Matters

People

Content

Clients

Contacts

Packets

Narratives

What's our history with Annaly Capital? Please include relationships our lawyers have with their contacts including the strength of those relationships.

Annaly Capital Management — Relationship History

Annaly Capital Management has been a current, key client since July 16, 2020. The relationship is classified as stable and active, with the firm serving as Annaly's primary counsel for fund formations and IPOs.

Relationship profile

- Client relationship partner: [Ryan St. Claire](#)
- Client status: Current; key client; Top 25 / Top 50 client classifications
- Primary workstreams: Fund formation, REIT structuring, IPOs and capital markets, real estate finance, tax planning, and tax controversy
- Recorded financials: \$628,746.05 billed to date; 690 total matter hours; last time entry recorded June 5, 2025
- Commercial arrangements: Blended rates and success fees are recorded. The client's communication guidelines require regular financial-status updates every 15 days.
- Relationship objective: Deliver timely, innovative, and cost-effective legal advice.

Annaly contacts and relationship strength

Annaly contact	Title	Relationship strength	Relationship context
Anthony Green	Chief Operating Officer	Very Strong	Senior operating contact
Audrey Susanin	Chief Compliance Officer	Very Strong	Key compliance contact

What Firm AI Search Offers:

- Complex, multi-entity queries in one ask
- Conversational follow-ups to refine results
- Citations and references to Foundation sources
- Results as chat summary or structured table

Record Lookups

Pull exact records with just a few clicks. When you already know the matter, client, or person, @-mention it in Lito and ask. Record lookups returns that record in moments. Respects entitlements, field-level security, and ethical walls. Answers in minutes, not days.

Step 1

Type @ and the matter, client, or person you know

Step 2

Pick from autocomplete suggestions

Step 3

Ask in plain language. Get your answer with record links

Want to see it in action?

[Schedule time with our team](#), or request to [join our waitlist here](#)