

AI FOR ACCOUNTING

CLAUDE BY ANTHROPIC

How Legacy's Accounting Team Works Smarter with Claude

An AI implementation case study | Legacy Residential Group | October 2026

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CLIENT**Legacy Residential
Group**

Miami, Florida

DEPARTMENT**Accounting**

Claude for finance work

PLATFORM**Claude by Anthropic**

Claude Team with SSO

Legacy Residential Group wanted to find out what AI could do for its accounting department, and it wanted to get it right from the start: secure, compliant and focused on real efficiency gains for the accounting team. As an Anthropic partner, VirtuWorks deployed Claude for Legacy's accountants, set up single sign-on with the company's Microsoft accounts, and now meets with the team every month to keep finding better ways to work with AI.

KEY TAKEAWAYS

Legacy brought Claude by Anthropic into its accounting department to help the team work more efficiently.



VirtuWorks set up Claude Team with Microsoft single sign-on, so accountants use the credentials they already have.



A clear AI use policy guides how the accounting team handles financial data with AI.



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01 THE CLIENT

About Legacy Residential Group

Headquartered in Miami, Legacy Residential Group specializes in the acquisition, operation and development of workforce multifamily housing throughout Florida. The company owns and operates more than 6,000 multifamily units, with more than 3,400 more under development, in communities from Miami and Brickell to Pompano Beach, Tamarac and Melbourne. Behind all of that sits an accounting department responsible for keeping the financial side of a large and growing portfolio accurate, organized and on time.

6,000+

multifamily operated units owned and operated

3,400+

more units under development

15 yrs

with VirtuWorks as its IT partner

02 THE CHALLENGE

Bringing AI Into Accounting **the Right Way**

Accounting is one of the best places in any business to use AI, and one of the most sensitive. Legacy's accounting team handles a high volume of detailed, time-consuming work, and much of it involves confidential financial information. Leadership could see how AI might help the team move faster, but they also knew that how AI was introduced into accounting would matter just as much as which AI tool they picked. Without a plan, AI tends to show up on its own. Individual staff try free tools on personal accounts, financial data ends up somewhere IT can't see, and no one can say what's being used or whether it's working. For an accounting department, that's not a risk worth taking. Legacy needed one trusted AI platform for its accountants, connected to the accounts they already use, protected by tight security and governed by clear rules that keep the department compliant.

They also wanted more than access. The goal was for the accounting team to actually get better at their work with AI.

That meant understanding the department's workflows and pointing AI at the tasks where it would help most.

03 THE SOLUTION

Claude by Anthropic for the Accounting Team

As an Anthropic partner, VirtuWorks led the AI implementation for Legacy's accounting department from planning through deployment. The work came together in three parts.



PART 1

Claude Team with Microsoft single sign-on

We set up Claude Team for the accounting department and implemented single sign-on (SSO) through Legacy's Microsoft accounts using Microsoft Entra ID. Accountants sign in to Claude with the same corporate credentials they use for email and everything else, and access is managed in one place. When someone joins the accounting team, changes roles or leaves, their Claude access follows the same controls as the rest of their Microsoft 365 account.



PART 2

Mapping accounting workflows to AI

Next, we sat down with the accounting team to walk through how their work actually gets done, step by step. That review showed where Claude could save the most time and where it could make the team more efficient, and it shaped how Claude was rolled out in the department. The aim was to make Claude part of the way Legacy's accountants work every day, not another app that sits unused.



PART 3

An AI use policy built for financial data

We also helped Legacy put a clear AI use policy in place for the accounting team. It spells out what kinds of financial information are appropriate to use with Claude, how AI-assisted work should be reviewed before it's relied on, and who to ask when something isn't clear. For a team that works with confidential numbers every day, that guidance is what makes AI safe to use. It also ties directly into VirtuWorks' approach to AI readiness and compliance.

04 SECURITY

Security and Compliance for AI in Accounting

Security was part of the plan from day one. Because VirtuWorks also provides managed IT services and managed cybersecurity, the Claude rollout was built on the same identity, access and data protection practices that already protect Legacy. Single sign-on keeps the accounting team's AI access tied to corporate accounts. The AI use policy sets clear limits on how financial information is handled. And ongoing oversight keeps the department's use of AI in line with Legacy's security and compliance requirements.

Anthropic builds Claude with business security in mind, and its Trust Center outlines the security and compliance standards behind the platform. Pairing that with VirtuWorks' own controls means the accounting team gets the benefits of AI without giving up control of its data. That is the difference between a secure AI deployment and simply handing a team a new tool.

05 ONGOING PARTNERSHIP

Monthly AI Strategy Sessions

An AI rollout doesn't end at launch. VirtuWorks meets with Legacy's accounting team every month to keep building on what's working. The sessions focus on learning and strategy: the team brings questions, tries out new ideas and works with VirtuWorks to find more ways Claude can help them get work done efficiently. These meetings are also where the accounting team brings the real problems it's trying to solve. Together, we look at each one, talk through whether and how Claude can help, and decide on the best approach in a systematic way. Each session builds on the last, so the team's use of AI keeps getting sharper over time.

06 THE RESULTS

A More Efficient Accounting Department

Today, Legacy's accounting team works with Claude through a single, familiar sign-in. Their use of AI is guided by a clear policy, protected by tight security and aligned with the company's compliance requirements. With monthly strategy sessions on the calendar, the team keeps learning, solving problems and finding new ways to work more efficiently.

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For 15 years, VirtuWorks has been more than an IT provider to us. They've been a true partner. They understand our business, they protect our data like it's their own, and they've earned our trust time and again. Accounting is not a place to experiment carelessly with new technology, so when we decided to bring AI into our department, there was no question who we'd trust to do it. VirtuWorks set up Claude the right way, with security, single sign-on, and a clear AI use policy from day one, and they keep showing up every month to help our team get better at using it.

Nayade Alpizar
Chief Financial Officer, Legacy Residential Group

07 LESSONS FOR FINANCE TEAMS

How to Bring AI Into **Your Accounting Department**

Legacy's approach is a practical model for any business that wants to use Claude, or AI in general, to make its accounting or finance team more efficient.

1

IT services since

Focusing on a single team, like accounting, lets you prove the value of AI, learn what works and build a model you can repeat.

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3

Write an AI use policy before you scale.

Teams that handle financial data need clear guidance on what information they can use with AI and how to review AI-assisted work.

4

Map AI to real accounting workflows.

The biggest efficiency gains come from understanding how the work actually gets done and applying AI where it saves the most time.

5

5 Plan for ongoing learning.

Regular strategy sessions, like Legacy's monthly meetings, help the team build skills, answer questions and keep finding new opportunities

6

Choose a partner who understands security.

An AI partner that also manages your IT and cybersecurity can make sure AI strengthens your protection instead of creating new risk.

If your team is just getting started, a **business AI workshop** is a simple way to explore where AI fits before you roll anything out.

Just as important, Legacy is making deliberate, informed decisions about how AI fits into its accounting work instead of guessing. The department has a secure foundation, a clear policy and a trusted Anthropic partner to help it take each next step.

08 ABOUT VIRTUWORKS

Why Legacy Chose VirtuWorks

VirtuWorks has been providing IT services since 1994 and is an Anthropic partner, a Tier 1 Microsoft Cloud Solution Provider, ISO 27001 certified and SOC 2 Type II attested. Legacy has trusted VirtuWorks as its IT partner for 15 years, so when the accounting department decided to bring in AI, the choice was an easy one.

That combination of history and expertise matters for an AI project in accounting. Legacy's team got a partner that understands Claude by Anthropic, Microsoft identity and security, and the realities of protecting financial data, all in one place. VirtuWorks also supports accounting teams and property management companies with AI-powered IT solutions built around how they actually work.



IT services since
1994



Anthropic partner



Tier 1 Microsoft
Cloud Solution
Provider



ISO 27001
certified, SOC 2
Type II attested

30+

years providing IT services

15 yrs

as Legacy's IT partner

1

partner for Claude, Microsoft
identity and security

Ready to bring Claude to your accounting team?

Schedule a call →

VirtuWorks helps businesses implement Claude by Anthropic securely, from AI readiness and Microsoft single sign-on to AI use policies and ongoing AI strategy. Schedule a call to talk about what AI could do for your finance team.