Lassie and TownAI Raise as Verified AI, Open Models, and AI-Native Services Gain Momentum

VC Tech Radar

2026-06-04

Lassie and TownAI Raise as Verified AI, Open Models, and AI-Native Services Gain Momentum

By VC Tech Radar • June 4, 2026

Fresh Series A rounds for Lassie and TownAI highlighted the shift from copilots to systems that execute work, while Axiom Math, Harvey, and open-model infrastructure pointed to new technical leverage. YC's AI-native services playbook was the clearest market signal for what to underwrite next.

Funding & Deals

- **Lassie - $47M Series A led by a16z.** Lassie says it already works autonomously for 700+ dental practices, delivering 30 hours of labor per month by handling workflows like insurance claims and payments. Founders Steijn Pelle and Frederic Renken left Robinhood and Superhuman, then spent months in dental offices processing payments by hand before writing code. a16z's thesis is that small-business owners are buried in back-office work and that Lassie is built to do the work, not just assist with it. [1, 2]
- **TownAI - $55M Series A led by a16z, with Forerunner, First Round, Alt Cap, and Conviction.** Coming out of beta, Town connects across email, calendar, Slack, docs, WhatsApp, desktop, and web, then handles drafting, scheduling, project tracking, follow-ups, context gathering, and other multi-step tasks while adapting to the user's voice, relationships, priorities, and routines; it only acts when the user says so. The team combines former Plaid CTO Jean-Denis Greze with former Google product/AI and Dropbox design leader Tony Vincent. Investor reaction was notably strong: Sarah Guo highlighted the product as a distinctly different AI experience, and Ben Horowitz said he has been using it. [3, 4, 5, 6]

Emerging Teams

- **Hexa - AI automation for industrial distribution.** YC's framing is simple: 50% of orders go to whoever quotes first, yet distributors still hand-copy RFQs into 30-year-old software. Hexa is automating sales and procurement workflows so industrial distributors can quote faster and win more bids. Founders: @Ishaanx75, @MannPatira, and @AuriNayak. YC launch: Hexa. [7, 8]
- **PliOS - compliance OS from a founder with real domain depth.** The founder says he spent 10+ years in financial regulation and compliance, including work as a bank regulator and senior director in fintech/digital assets, and also has a software engineering background. PliOS was launched recently and uses AI agents to map obligations to FinCEN, OFAC, and state MTL rules, draft policies, run examiner-grade risk assessments, and generate board-ready reports; the positioning is a fractional CCO for crypto, fintech, banks, and MSBs. [9]
- **Wato - collaboration infrastructure for multi-agent teams.** The company is building a shared AI workspace with shared knowledge, cloud agents, automations, and permissioned tools across the AI subscriptions companies already use. Founders: @arihanxv and @rahulrejeev. YC launch: Wato. [10]
- **Playabl.ai - notable consumer traction.** YC describes it as a TikTok for user-generated games where anyone can play, create, publish, and monetize; it says the product reached 1M organic plays across 3,000 games in five days. Founders: @hamzawy998, @omarmjarrah, and @sanadkiswani. [11, 12]

AI & Tech Breakthroughs

- **Axiom Math - formal verification is emerging as a serious AI advantage.** Latent Space reports the seven-month-old startup solved all 12 Putnam problems, with 8/12 inside the official time limit; the same source notes the result exceeded top undergraduate scores and prior reported AI results, while also flagging that time-limit comparisons are imperfect. The company also reportedly reached 99% (187/189) on the Verina code-and-proof benchmark versus 4.9% for OpenAI o3, and its thesis is that Lean-verified proofs create a high-quality corpus that can compound across training and inference. Axiom has also open-sourced AXLE for exploring, validating, and manipulating Lean proofs, and the episode references a $200M Series A at a $1.6B valuation. [13]
- **Hybrid and post-trained open legal agents are getting economically compelling.** Harvey says a hybrid setup with GLM 5.1 as the primary worker and Opus 4.7 as an advisor reached an 18% all-pass rate on a 100-task legal benchmark slice versus 14% for Opus alone, at $368

versus $954, with Opus invoked just 0.83 times per task on average. The same work says SFT moved Kimi 2.6 from 11% to 15% all-pass, again above Opus on that slice, at $84 versus $954. The read-through from Clement Delangue is that routing plus post-training can outperform blanket frontier-model usage in cost-sensitive, high-accuracy domains. [14, 15]

- **InstinctRazor shows one path to large-model inference on modest GPUs.** General-Instinct says its 122B MoE setup keeps experts on CPU and active GPU VRAM around 8 GB, with a compressed model size of about 50 GB total. Its published table shows it ahead of Gemma-4-A4B on 5 of 7 listed evals, including MMLU-Pro, GPQA-Diamond, MMMLU, HLE no-tools, and LiveCodeBench v6; the authors also note it trails on MATH-500 and AIME, so the key signal is the memory/performance tradeoff. [16]
- **Ideogram 4.0 keeps the open image stack moving.** Ideogram introduced 4.0 with downloadable weights, user fine-tuning, and local hardware runs. a16z and Martin Casado both highlighted the release, with Casado specifically pointing to strong Design Arena performance and the health of the open-source image ecosystem. [17, 18, 19]

Market Signals

- **Copilots are giving way to systems that own the workflow.** YC's latest framing is that some of the biggest next-decade companies may be services businesses rebuilt with AI doing most of the work, not software vendors selling internal tools. That logic matches what was actually funded this week: Lassie says it does the work for dental practices rather than act as a copilot, and Town is positioning as a personal assistant that already knows how the user works and can handle multi-step tasks. [20, 21, 2, 3, 4]
- **YC's underwriting checklist for AI-native services is unusually practical.** The best markets are ones where work is already outsourced, task-level judgment is low enough for most steps to be automated, the overall job is hard enough that models plus humans can outperform either alone, and regulation can raise the moat. On team quality, YC is looking for domain fluency, model fluency, and operational rigor; on execution, it warns that too many early pilots and output variance are existential risks. [21]
- **The model layer is fragmenting in favor of routing, post-training, and deployment advantage.** Harvey and Fireworks point to domain-specific systems that beat frontier APIs on cost and sometimes quality, Ideogram is distributing open weights for local use, and InstinctRazor is compressing the hardware barrier for large models. The pattern strengthens the case for model harnesses and vertical tuning as investable layers. [14, 15, 17, 16]

Worth Your Time

- **How to Build an AI-Native Services Company** - the clearest operating playbook in the set: why outcome-based AI services exist now, which markets fit, what team traits matter, and why variance kills these businesses faster than price. [21]

How to Build an AI-Native Services Company (0:09)

"The world is not made of words." [22]

- **A functional taxonomy of world models** - Fei-Fei Li's short framing for why world models learn the structure of space and time, not just text, and why that could matter for systems that need to reason about and interact with the physical world. [22]
- **Scaling Past Informal AI - Carina Hong, Axiom Math** - the best source here for Axiom's Putnam result, Verina score, AXLE, and the broader thesis that formally verified outputs compound. [13]
- **Harvey's legal-model thread** - a compact case study in selective frontier routing and post-training economics for a domain where precision matters. [14]
- **InstinctRazor blog** - worth reading if you care about the memory/performance tradeoff behind large-model inference on modest hardware. [16]

Sources

1. X post by @steijnpelle
2. X post by @a16z
3. X post by @jgreze
4. X post by @a16z
5. X post by @saranormous
6. X post by @bhorowitz
7. X post by @ycombinator
8. X post by @ycombinator
9. r/SaaS post by u/Mr_Irrelevant15
10. X post by @ycombinator
11. X post by @ycombinator
12. X post by @ycombinator
13. Scaling Past Informal AI - Carina Hong, Axiom Math
14. X post by @harvey
15. X post by @ClementDelangue
16. r/deeplearning post by u/Hairy_Strawberry7028
17. X post by @ideogram_ai
18. X post by @a16z
19. X post by @martin_casado
20. X post by @ycombinator
21. How to Build an AI-Native Services Company
22. X post by @a16z