



Intuit Accountants Releases First-Annual 2022 Taxpayer Insights & Intelligence Brief

Study finds taxpayers' appetite for tax advisory, rigorous data security, and audit protection among the top expectations when working with tax professionals

PLANO, Texas--(BUSINESS WIRE)-- Today, Intuit (NASDAQ: INTU), the global financial technology platform that makes [TurboTax](#), [QuickBooks](#), [Credit Karma](#), and [Mailchimp](#) released its first-annual 2022 [Taxpayer Insights & Intelligence Brief](#). This comprehensive study surveyed over 3,000 United States taxpayers using a tax professional to prepare their taxes.* The study provided a holistic view of a taxpayer's experience when working with a tax professional to gain insights into their expectations and service needs.

The results showed as the tax and accounting industry shifts from leading with compliance based work to offering tax advisory services, there is a strong appetite from taxpayers for tax advisory and audit protection/resolution services. Additionally, the remote work revolution has increased the value of data storage, security, and electronic signatures in the minds of taxpayers.

"At Intuit we strongly believe that to best deliver for tax professionals it is important to understand what matters utmost to them - and that is their clients," said Dustin Kroeger, ProTax Group VP of Marketing. "This study sheds light on what's important to clients regarding not only the services they receive from their pros, but also how they work with their pros. As we gain these insights, we can work together to drive better financial outcomes for their clients."

The study's results additionally showed a strong market opportunity for tax professionals to adapt their portfolio of services to meet the needs of taxpayers. "Intuit works to solve pain points for our customers," said Kroeger. "As we gain these insights, we can all work more seamlessly in tandem for taxpayer and firm needs to power growth and success."

Topics highlighted in the study include:

Tax advisory

- 69% of taxpayers want more advice from their pro.
- 83% of taxpayers would rather work with a tax professional who can give tax advice year round, in addition to filing their tax return.
- 79% of taxpayers are willing to pay more for a tax professional's services if it might result in improved financial outcomes (e.g., reducing tax liability, money savings, etc.).

Audit protection and resolution

- 84% of taxpayers want to have peace of mind knowing they will have help in the event of an IRS audit.

- 7 out of 9 taxpayers would choose a tax professional who offers audit protection over one who does not.

Data storage, transfer, and security

- 66% of taxpayers expect to sign tax documents electronically.
- 86% of taxpayers expect their tax professional to store their tax documents/information with industry-standard security (e.g., an encrypted server with an enterprise firewall).

For more information about Intuit's ecosystem of tax solutions, visit <https://proconnect.intuit.com/>.

ABOUT INTUIT: Intuit is the global financial technology platform that powers prosperity for the people and communities we serve. Serving more than 100 million customers worldwide with [TurboTax](#), [QuickBooks](#), [Credit Karma](#), and [Mailchimp](#), we believe that everyone should have the opportunity to prosper. We never stop working to find new, innovative ways to make that possible. Please visit us for the latest information [about Intuit](#), our products and services, and find us on [social](#).

** Source: "Taxpayer" study, Radius Research, April 2022.*

View source version on businesswire.com:
<https://www.businesswire.com/news/home/20221213005216/en/>

Debra Hammer
Debra_hammer@intuit.com

Source: Intuit Inc.