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Intuit's AI-Driven Expert Platform Redefines Tax Filing with 'Done-For-You' Experiences

Seamless AI-Powered Solutions and Consumer Platform Innovations Deliver Unparalleled Ease, Confidence and Faster Refunds

MOUNTAIN VIEW, Calif.--(BUSINESS WIRE)-- [Intuit Inc.](#) (Nasdaq: INTU), the global financial technology platform that makes Intuit [TurboTax](#), [Credit Karma](#), [QuickBooks](#), and [Mailchimp](#), today announced its tax platform offerings for personal and small business filers. New innovations and seamless integrations across Intuit's AI-driven expert platform deliver an accurate and personalized "done-for-you" tax filing experience with speed, guaranteeing maximum refunds faster. Extending its efforts to empower taxpayers beyond tax season, Intuit now also helps customers make smart money decisions year round for an even better tax outcome next year.

"Receiving a [tax refund](#) is a pivotal moment in the financial lives of millions of Americans each year, so we're laser focused on eliminating the work and worry of tax filing, delivering the best 'done-for-you' tax prep experience on the market that puts maximum refunds guaranteed into customers' pockets faster," said Executive Vice President and General Manager of Intuit's Consumer Group, Mark Notarainni. "With our connected consumer platform we go even further, empowering customers across Credit Karma and TurboTax with year-round insights and personalized recommendations, so we can help our customers navigate their financial journey beyond tax season."

Intuit's AI-Powered TurboTax Experts Deliver Personalized, Transparent Tax Prep in Just 2 Hours

The assisted tax preparation method is plagued with inefficiency for tax filers and tax preparers. It is time-consuming, manual, and expensive, with little price transparency. Intuit's AI-driven expert network delivers [full service, assisted tax prep](#) with a live tax expert in a modern, tech-enhanced, and convenient experience from start to finish.

Now filers can have their tax year 2024 taxes prepared for them in as little as two hours. Through Intuit's AI-driven expert network, customers are connected virtually with a qualified tax expert with experience in their tax situation and complexity, directly through TurboTax, the Credit Karma app, or [QuickBooks Online](#). Whether filing personal or [small business taxes](#), Intuit customers can get their taxes done for them with confidence knowing that TurboTax experts have the power of Intuit's AI platform at their fingertips flagging the highest deductions, credits, and accuracy along the way.

With approval from customers, Intuit's AI algorithms analyze customer information to quickly match them with the best-suited TurboTax expert from its nationwide network of 12,000 experts, including [CPAs](#), [EAs](#), and [tax attorneys](#). Once matched, TurboTax's tax document

import and upload capabilities make sharing tax data with their experts a breeze, dramatically improving speed, accuracy, and ultimately providing customers with access to their money quickly. A new real-time progress tracker within the TurboTax iOS mobile app makes it easy for customers to go about their day, easily following their expert's progress. The tracker indicates when the tax expert has questions, progressed, or is done, eliminating the uncertainty that comes with traditional tax prep methods. Upfront and transparent pricing ensures there are no surprise fees.

Only through [TurboTax Live Assisted](#) can customers who choose to prepare their own taxes also connect with experts on-demand via phone, video call, or chat to gain the confidence they need. TurboTax Live Assisted is also the only tax filing solution on the market that provides customers an expert final review at no added cost, ensuring 100 percent accuracy and maximum refund guaranteed.

With a nationwide network of personal and small business tax experts who have on average 12 years of experience each, Intuit is putting expertise in the pockets of its customers, giving them the knowledge they need to make smart money decisions.

Intuit's AI-Driven Platform Delivers 'Done-For-You' Taxes

For millions of Americans, the tax refund, averaging over \$3,000, represents the largest paycheck of the year.¹ Getting fast access to those funds can be critical. However, preparing taxes can be stressful and confusing, and filers can waste unnecessary time manually entering information from their tax forms, which can lead to unintended mistakes, or answering questions that aren't relevant to their situation. For those who choose to file their tax year 2024 taxes on their own, TurboTax, built on Intuit's AI-driven expert platform, offers a personalized, fast, and confidence-inspiring [tax preparation and filing](#) experience with built-in guidance, and faster access to their refunds.

TurboTax's industry-leading tax document auto-fill capabilities offer broad support of tax document import, upload, and photo capture. Customers have multiple methods to automatically enter their data, including simple document import from more than 350 financial institutions. Intuit's AI platform then auto-fills the majority of tax returns, minimizing manual data entry, and enabling a truly "done-for-you" tax filing experience. Continuing to build on the previously announced Intuit Assist, customers receive thorough and personalized explanations throughout the filing process, ensuring customers understand the "why" behind the numbers, adding to their confidence that their taxes are done right. While automated workflows anticipate the filer's needs, serving up real-time accuracy checks as customers complete their return.

Seamless integrations across TurboTax and Credit Karma, and TurboTax and QuickBooks, eliminate the need for customers to juggle multiple financial apps. New this year, year-round [personalized tax insights and suggestions](#) ensure Credit Karma customers get the best tax outcome on their life events throughout the year. These integrations, combined with Intuit's AI-driven document import and auto-fill technology further streamlines data entry for Intuit customers across its platform.

TurboTax continues to offer its faster refund solutions. Customers can get their refund with speed through Intuit's Up To 5 Days Early² with Credit Karma Money³. And with its online

[Refund Advance loan](#),⁴ approved customers can get up to \$4,000 into a Credit Karma Money account in as little as 60 seconds after IRS acceptance of their tax filing,⁵ with \$0 loan fees, 0% APR, and no credit score impact.⁶

Intuit's Consumer Platform Helps Customers Make Smart Money Decisions at Tax Time and Beyond

Seamlessly connecting TurboTax and Credit Karma, Intuit's consumer platform empowers customers to make smarter money decisions at tax time and beyond. Starting this January, Credit Karma members will receive personalized tax-impacting insights throughout the year, ensuring they get the best possible tax outcome when the time comes to file their taxes directly within the app's powered-by-TurboTax experience. For instance, customers with mortgages might receive a [mortgage interest deduction](#) insight that conveys the estimated figure they can deduct from the interest they've paid on their home loan.

Directly within the Credit Karma app, Intuit's AI platform will automatically organize tax documents, transfer relevant data, and auto-fill a majority of the customer's return, eliminating manual entry and reducing accidental customer typos. After they've completed filing, Credit Karma members are able to optimize their money and take advantage of financial opportunities.

Intuit's consumer platform delivers a truly personalized, 'done-for-you' financial experience, empowering customers to make smart money decisions, take steps to improve their financial health year-round, and achieve their best tax outcome, guaranteed.

Pricing and Availability

Tax year 2024 TurboTax products are available today, Dec. 5, 2024, in English and Spanish at www.TurboTax.com, the Apple [App Store](#), and [Google Play Store](#). QuickBooks tax products are also available today at QuickBooks.com. Credit Karma tax filing products will be available via the Credit Karma app in English this Jan. 2025 and timed to the start date for individual tax returns.

TurboTax Business Tax Live Assisted and Live Full Service offerings are for small businesses, including S-corps, LLCs, and partnerships, and are available in English today and in Spanish in Feb. 2025. For a limited time, business tax filers receive 20% off personal taxes filed with TurboTax, and those who do not have a QuickBooks account will be offered a 30-day QuickBooks Online trial (starting in Jan. 2025).

About Intuit

[Intuit](#) is the global financial technology platform that powers prosperity for the people and communities we serve. With approximately 100 million customers worldwide using products such as [TurboTax](#), [Credit Karma](#), [QuickBooks](#), 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 at Intuit.com and find us on [social](#) for the latest information about Intuit and our products and services.

Disclaimer details:

¹ \$3,004 is the average refund amount American taxpayers received in the 2024 filing season based on [IRS data as of October 18, 2024](#).

² **Up To 5 Days Early with Credit Karma Money:** *To be eligible, you don't need to file your taxes with a particular tax prep service. However, you will not be eligible if you choose to pay your tax preparation fee using your federal tax refund or choose to take a Refund Advance loan. 5-day early program may change or discontinue at any time. Up to 5 days early access to your federal tax refund is compared to standard tax refund electronic deposit and is dependent on and subject to IRS submitting refund information to the bank before release date. IRS may not submit refund information early.*

³ Banking services provided by MVB Bank, Inc., Member FDIC. Maximum balance and transfer limits apply. A maximum of 6 withdrawals per monthly savings statement cycle may apply.

⁴ Refund Advance is a loan issued by First Century Bank, N.A. or WebBank, neither of which are affiliated with MVB Bank, Inc., Member FDIC. Refund Advance loans issued by First Century Bank, N.A., are facilitated by Intuit TT Offerings Inc. (NMLS # 1889291), a subsidiary of Intuit Inc. Refund Advance loans issued by WebBank are facilitated by Intuit Financing Inc. (NMLS#1136148), a subsidiary of Intuit Inc. Terms apply. Learn more here: <https://turbotax.intuit.com/refund-advance>.

⁵ IRS accepts returns starting late-Jan. Acceptance times vary. Most customers receive funds within 15 minutes of acceptance.

⁶ Refund Advance and 5 Day Early Program not to be combined.

See guarantee details at turbotax.intuit.com/guarantees/.

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