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Intuit ProConnect Launches The Path to Advisory Guide

This comprehensive guide educates tax firms on how to lead with planning and advisory services to improve work life balance, impact clients' lives, and streamline their practice with innovative technology

PLANO, Texas--(BUSINESS WIRE)-- Today, [Intuit ProConnect](#), from [Intuit Inc.](#) (Nasdaq: INTU), is announcing The Path to Advisory, a comprehensive, free [on-line guide](#) available through the [Intuit ProConnect Tax Pro Center](#) to help firms lead with planning and advisory services. Using the collective knowledge, experience, tools, and best practices from Intuit Tax Council Members - tax professionals who help lead and shape positive change in the profession to help empower professionals to drive prosperity for clients and firms - this guide offers clear, actionable steps for firms looking to add advisory services, or firms already in the process of switching.

“At Intuit, everything we do starts with our customers and their aspirations,” said Jorge Olavarrieta, Vice President of Product Management and Design at Intuit. “We’re seeing a shift in the tax profession from leading with compliance services to leading with advisory services. The Intuit Tax Council Members created The Path to Advisory to make the journey to advisory services more seamless and help aid tax professionals looking for new ways to have a more significant impact on their clients’ financial well-being.”

Staffing challenges, compliance obligations, technology advances and world events are changing the way tax professionals work. The in-depth guide offers testimonials and coaching tips from Intuit Tax Council Members who have made the move towards advisory services, along with data, workbook pages, task lists, and more. The guide is organized in chapters that build upon one another within three distinct stages: defining the vision, planning the roadmap, and growing your practice.

According to an August Intuit Accountant survey, 74% of tax firms provide tax planning and advisory services, but only 62% say they are getting paid for those services*. With this guide, tax professionals will learn to:

- Elevate their firm and become a trusted advisor for clients
- Value and price advisory services
- Easily navigate and build bespoke advisory service plans for a range of clients
- Understand how to use time saved on compliance work to focus on improving advisory services
- Identify the tools they need to add and grow advisory services

“For many years, tax preparation has been the bread and butter of most accountants. But as times have changed, so too has the way that taxes are handled by accountants,” said Minal Babaria, CPA, Intuit Tax Council Member, and Founder of KB Tax Deviser CPAs. “Tax professionals want to provide valuable advice that extends beyond basic tax preparation and

get paid for that value rather than time. If you want your business to stand out from the pack, then it's important to focus on providing value-added services that can reap benefits for both tax professionals and clients. Understanding how to better enable success is a year-round process as lives and businesses change rather than a one-time interaction that doesn't give the whole picture for a client's needs."

The Path to Advisory guide is designed to help make a transition from reliance on compliance to leading with advisory services seamless, and allow firm owners across the country to benefit from expert knowledge and lessons learned. With this guide, tax pros will have the tips and tools to move forward with confidence along the path to advisory services.

About Intuit

About Intuit

Intuit is a global technology platform that helps our customers and communities overcome their most important financial challenges. Serving approximately 100 million customers worldwide with [TurboTax](#), [QuickBooks](#), [Mint](#) and [Credit Karma](#), 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: Intuit Accountants Survey, August 2021 (n=786)

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Source: Intuit Inc.