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Intuit Accountants Announces New Products and Updates for Tax Year 2021

To help prepare tax professionals for the upcoming tax season, Intuit Accountants shares new tax software updates for ProConnect Tax Online®, ProSeries®, and Lacerte®

PLANO, Texas--(BUSINESS WIRE)-- Today, Intuit Accountants, from Intuit *(NASDAQ: INTU),* the global technology platform that makes TurboTax, QuickBooks, Mint, Credit Karma, and Mailchimp, is announcing its latest updates to its products and services including ProConnect Tax Online®, ProSeries®, and Lacerte® for the upcoming tax year. Intuit works each year to offer the most efficient tools for tax professionals.

On the heels of the new Path to Advisory guide and AccounTrends podcast, Intuit is adding more enhancements to its products and ways to help tax and accounting professionals focus on their clients' needs and the future of their businesses. Featured improvements for tax year 2021 include:

Updates to PTO

- **Direct data import.** Drag and drop client's tax documents directly into their return. No manual data entry with Intuit Link request needed.
- **Smart navigation.** ProConnect intelligently predicts the tax forms and suggests what is needed for a client based on data and common workflow patterns.
- **Assign and manage work.** Assign and sort client returns by staff members, then re-assign each return as it changes hands within your firm, to monitor team workloads and return status.
- **Lock returns.** You can now auto-lock e-filed returns to prevent manual entry errors and calculation updates that may alter the original e-filed tax return.
- **Expanded eFile status.** Once filed, easily view the file status by return type (federal, state and extensions).
- **Multiple preparer awareness.** Tax pros can get a full view of any users working on the same tax return to avoid version conflicts or overwriting each other's work.
- **eSignature improvements.** Seamlessly access eSig in your workflow. Improved Account Management makes new user onboarding simple and easy for current users.
- **Tax return reports.** (Coming soon) You can soon export clients' data from standard tax return fields and query data based on common tax scenarios.
- **Improved jump-to input coverage.** (Coming soon) For tax form fields with multiple inputs, you can view a summary of sources and values included in the calculation, then quickly jump to the data input screen from the tax form field in one click.

Updates to Lacerte

- **Verify your EFIN in Lacerte.** Manage your EFIN more efficiently directly within Lacerte.
- **New billing profile.** Billing for Lacerte, Intuit eSignature, and Tax Scan and Import has

been consolidated into a single wallet. Now you won't have to re-enter your information every time you want to make a purchase.
- **Easier onboarding to Hosting for Lacerte.** New and returning subscribers can get up and running faster with Lacerte in the cloud via automated data transfer.
- **Lacerte Actionable Steps for Error Resolution (LASER).** Quickly self-resolve problems in Lacerte as they arise by making use of actionable links made available when and where you need them to minimize any disruption to your workflow.
- **Lacerte 200 Federal 1040 enhancements.** Now you can keep track of the returns you've used with an on-screen counter. You'll also get a message when you're nearing your bundle limit.
- **eSignature improvements**. Tax Pros can now batch send eSig requests on the same document from multiple signers at one go. Improved Account Management makes new user onboarding seamless and easy for current users.
- **Tax accuracy notifications.** (Coming soon) Tax pros can now receive proactive notifications about returns that were affected by tax law or other changes after you filed them and what to do next.

Updates to ProSeries

- **QuickBooks integration.** We've updated your experience with a new dialog box that can auto-detect open QuickBooks files and allows you to set beginning and end dates, and the basis for a client's return.
- **Prior-year background color.** Now you can know whether you're working on a client's current-year return or their prior-year return based on different background colors on-screen.
- **Integrated calculator enhancements.** Now, ProSeries will respond to your Windows settings, grow and shrink to your preferred size, and allow for three types of data entry.
- **New billing profile.** Billing for ProSeries, Intuit eSignature, and Tax Scan and Import has been consolidated into a single wallet. Now you won't have to re-enter your information every time you want to make a purchase.
- **HomeBase view functionality.** Custom HomeBase view and filtering are now available for ProSeries Basic. And ProSeries Professional users can automatically transfer their custom views from their tax year 2020 software to their tax year 2021 software.
- **eSignature improvements.** You can now initiate eSig right from your Homebase view, saving even more time. As a low-touch alternative to the current eSig request widget, Tax Pros can send eSig requests with a single click. Improved Account Management, along with trial awareness placements in right rail, makes new user onboarding seamless and simple for current eSig users.
- **Tax accuracy notifications.** (Coming soon) You can receive proactive notifications about returns that were affected by tax law or other changes after you filed them and what to do next.
- **Background updater.** (Coming soon) ProSeries will soon automatically download, verify, and install updates when they're available without disrupting your workflow.

Path To Advisory

The new Path to Advisory paper is a comprehensive, free online 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.

AccounTrends Podcast

Hosted by Jasen Stine, Tax and Accounting Education Leader at Intuit, and David Bergstein, Chief Innovation Officer at Bergstein CPA, AccounTrends is bringing together leading minds in the tax and accounting industry to share knowledge and best practices. Join hosts as they speak with interesting guests from a diverse set of backgrounds to help tax and accounting professionals stay on top of the most important trends and how to shift their practices and businesses -- big and small -- to accommodate them. AccounTrends airs every other Tuesday.

This information is intended to outline our general product direction, but represents no obligation and should not be relied on in making a purchasing decision. Additional terms, conditions and fees may apply with certain features, functionality and attached services.

About Intuit

Intuit is the global technology platform that helps consumers and small businesses overcome their most important financial challenges. Serving more than 100 million customers worldwide with TurboTax, QuickBooks, Mint, 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.

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