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Intuit Accountants Launches Intuit Tax Advisor Integrating Tax Prep and Advisory

Tax prep and advisory are now streamlined into a simple, automated tool to save time and scale planning

PLANO, Texas--(BUSINESS WIRE)-- Today, Intuit (NASDAQ: INTU), the global financial technology platform that makes [TurboTax](#), [QuickBooks](#), [Credit Karma](#), and [Mailchimp](#), is announcing [Intuit Tax Advisor](#) (ITA), a new, convenient insights tool for tax professionals to deliver tax advisory services. Intuit Tax Advisor seamlessly integrates with Intuit Accountant software, Lacerte and ProConnect Tax, to provide insights and strategies for the tax professional's clients.

ITA generates client-friendly reports with recommendations that are personalized for estimated tax savings strategies. This includes what retirement plan contributions, income and deduction timing, and more, can do for clients. In addition to saving time, ITA helps advisors showcase their expertise and confidently develop personalized tax plans to enable growth for clients and their firms.

"Based on customer feedback, we designed Intuit Tax Advisor to help advisors save time and scale their planning services to more of their staff," said Jorge Olavarrieta, Vice President of product management and design at Intuit. "Tax professionals can simplify proactive tax planning and advisory services with ITA to replace the current process of cobbling together tax planners, spreadsheets, and reporting applications."

"When more and more people are in need of advisory services to help them make significant financial decisions, ITA can help tax professionals differentiate their services and power prosperity with industry-leading change," said Barry Pennett, the SVP and GM of Intuit ProConnect Group. "There is a clear need and appetite for creating more value for clients and firms, and ITA is designed to do just that."

Intuit Tax Advisor highlights include:

Tax Planning & Strategy:

- ITA helps traditional tax planners showcase their tax expertise by communicating the tax savings associated with each strategy recommended. Through the integration and use of the Lacerte calculation engine and client tax return, advisors can have more confidence in their tax projections and move-forward planning.
- ITA searches hundreds of potential triggers in the client tax data to generate smart tax strategies that pros can add, dismiss, or adjust. Tax professionals can also choose from a library of tax strategies or create their own custom strategies.
- All recommended tax strategies and estimated tax savings are automatically populated in a personalized, client-friendly report for tax professionals to share with their client which can be customized with specific firm logos and colors.

Streamlined data and integration:

- ITA seamlessly integrates with Lacerte and ProConnect Tax software to provide tax insights and strategies for the tax professional's clients.
- Tax return data for Lacerte and ProConnect is synced to ITA. This eliminates duplicate data entry, reduces errors, helps support better tax recommendations, and supports a more accurate tax projection.

Simple pricing:

- Pricing for ITA is straightforward and simple. To start generating custom tax plans for a client, customers just need to purchase a client credit. One client credit equals unlimited tax plans for that client within a calendar year.
- Customers are eligible to reserve three free client credits in 2022.

For more information on Intuit Tax Advisor, visit proconnect.intuit.com/tax-advice-planning-for-professionals/.

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