

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

profitable with incentives up to \$25 per return, free software offers and a free service to find new clients.

**Isaac M. O'Bannon** • Oct. 28, 2014



Intuit is introducing three new programs aimed to make tax professionals more profitable with incentives up to \$25 per return, free software offers and a free service to find new clients.

### **Intuit Personal Pro**

Tax professionals looking for new clients can join a free service that connects individuals and small business owners who want the tax return prepared for them with credentialed and highly experienced professionals. Intuit Personal Pro, formerly Intuit CPA Select, unveiled new branding and new benefits for tax professionals today.

The program, now open to Enrolled Agents and Certified Public Accountants,

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

New tax preparers get:

- Free [Intuit ProSeries software for tax professionals](#) who process more than 50 Refund Transfers during tax years 2014 and 2015
- \$10 per funded Refund Transfer
- Zero additional processing fees on all Refund Transfers (with a one-time per client bank setup fee).

Existing ProSeries receive:

- \$10 incentive on all incremental refund transfers processed over last year, or
- If you refer a friend who becomes a new customer, we'll pay a \$10 incentive per refund transfer on all transactions, plus
- Zero additional processing fees on all Refund Transfers (with a one-time per client bank setup fee).

### **American Express Serve Incentives**

Through a new partnership with American Express Serve, Intuit is offering its professionals \$15 per return for every client who accepts their refund on a new American Express Serve Card. In addition to the incentive, tax professionals can provide further benefits to their clients by eliminating unnecessary cash checking fees for taxpayers who choose to receive their eligible IRS tax refunds on an American Express Serve Card, a full-service reloadable prepaid account<sup>1</sup>.

“Our customers are passionate about delivering great service and these unique programs and incentives enable us to deliver real value to the tax professional by helping them grow their profits while providing increased savings to clients who often rely on fast and inexpensive refunds,” said CeCe Morken, Senior Vice President and General Manager of Intuit’s Professional Tax Division. “And with Personal Pro,

they can also make easier connections with new customers who sometimes need the

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved