

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

going through and painstakingly selecting tax strategies for their clients by researching and then calculating manually. TaxPlanIQ streamlines this process as you can ...

Oct. 30, 2020



**Jackie Meyer – Tax Firm Practice Management Expert** has launched a new tax firm planning web application for accountants, **TaxPlanIQ** helps firms streamline the tax planning processes, with the entire team maximizing highly-valued client services. The platform, powered by practice management software **Qount**, incorporates super-charged calculators that assist tax planners in quoting, implementing, and tracking tax strategies, all while showing and proving ROI to clients.

Jackie Meyer, CPA has invested hundreds of hours in training and independent

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

strategies when needed. I can use TaxPlanIQ with any potential or existing client and custom tailor a tax plan for them. In the end, I have a proposal package wrapped up with a bow.”

The platform is proven to save hours of manual work for any tax planner, instead of going through and painstakingly selecting tax strategies for their clients by researching and then calculating manually. TaxPlanIQ streamlines this process as you can search within the app, choose the strategies, then see a calculated breakdown of the tax savings. Through this software we've seen firms being able to triple their income (and equally decrease their time) by providing more valuable, efficient, and smooth communication to their existing clients.

Over the past several months, Jackie's team has worked tirelessly to streamline tax processes related to the CARES Act stimulus & Paycheck Protection Program. This easy-to-use app is now available to all firms, whether impacted by the coronavirus pandemic or not, so that they may maintain efficient operations. The Meyer Tax team can now assist other small tax firm owners, and their staff streamlines online workflows amidst the coronavirus pandemic. The app integrates with [Qount](#), a custom practice management platform, with ease.

*“It is essential right now for our firm to support other tax firms who are struggling to make the switch from brick and mortar to fully virtual. As a young tax professional, I appreciate serving as a tax firm leader that guides others to go 100% virtual like we are. We are teaching other professionals how to offer tax planning instead of just tax compliance, and it's gratifying,”* said Annalesha McCurley CPA, Meyer Tax Project Manager and Team Technology Coordinator.

For more information, or to sign up for our FREE 14 Day Trial, visit

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

© 2024 Firmworks, LLC. All rights reserved