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the tax planning process

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Jan. 11, 2021

Jackie Meyer, Certified Public Accountant and President and Founder of Meyer Tax Consulting, has ;launched TaxPlanIQ, a tax firm planning web application that helps with tax calculations, planning and organization. Powered by practice management software Qount, the platform decreases time spent on manually inputting data into spreadsheets by aggregating data into one place, improving workflow efficiencies and providing higher-value tax planning services.

“I am thrilled to announce the official launch of TaxPlanIQ. For years, the team at Meyer Tax and our network of industry professionals have worked together to troubleshoot the, often painstaking, process of tax planning,” said Jackie Meyer, Creator of TaxPlanIQ and recognized among *CPA Practice Advisor*’s 40 Under 40 for three consecutive years. “We are now incorporating all of that knowledge into TaxPlanIQ. We have developed a simple, effective process for utilizing tax planning strategies for firms, like ours, to show and prove their worth to their clients.”

Key features of the tax software, include:

- **Simple Setup and Easy-to-Use Interface:** TaxPlanIQ offers simple implementation and training to accountants. The software gathers critical data all into one portal, offering a more comprehensive and digestible approach to tax planning.
- **Comprehensive Library of Tax-Saving Strategies:** The software provides proven tax-saving strategies that enable users to select and customize according to client

needs.

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developed in consultation with expert tax advisors and is continuously enhanced with the most up-to-date educational content from the IRS and third-party vendors.

On the heels of the official launch, the Meyer Tax Consulting team conducted a “Tax Savings Challenge” with TaxPlanIQ. Participating accounting firms competed to determine who could save the most for their clients, using TaxPlanIQ’s proven tax-saving strategies. The winners, Taxes by the Sea in San Diego, CA and Josie Parr CPA LLC in Lakewood Ranch, FL, had combined savings of over half a million dollars within two months of using the new platform.

“We could not be more excited to watch TaxPlanIQ help accounting firms and their clients save money,” said Annalesha McCurley, CPA, Meyer Tax Project Manager and Team Technology Coordinator. “This past year has been difficult for many. For businesses who have had to pivot their business model or those shifting to a remote workforce, we are ready and eager to provide a digital service that simplifies tax planning and will improve day-to-day productivity.”

For more information on TaxPlanIQ and to enroll in a 14-day free trial, visit www.taxplaniq.com.

Technology

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