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Corvee, a software and solutions company that serves tax and accounting firms, has released its 2021 tax season questionnaires, file requests and engagement letters directly within the company's Tax Planning software.

This technology was developed by Michael Bergman, lead software engineer at Corvee, and the Corvee team and is the first time tax prep questionnaires will feed directly into tax planning calculations. This automation of information will give tax professionals the ability to complete 80% of tax planning for their clients when collecting tax preparation documents. The tax planning calculation covers dozens of strategies, multiple entities, and multiple years.

The company is focused around helping tax and accounting professionals grow, build and optimize their firms. With the Tax Planning software, tax professionals are able to formulate a tax savings calculation, develop a proactive and strategic tax plan and be the trusted advisor clients need.

“We are thrilled Michael and the Corvee team developed this latest addition to our

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“Corvee has already changed the way we plan and advise our clients on the best tax planning strategies based on their needs,” states Julie Herres, owner of GreenOak Accounting. “This latest technology will bring our planning to the next level! We will be able to take full advantage of the work we do for tax preparation to help streamline the strategy and planning process for the rest of the year.”

In addition to tax planning software, Corvee offers growth and development programs that help firms transition from compliance to advisory services.

Advisory • Technology

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