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for estimated tax savings strategies.

Aug. 30, 2022

The Intuit logo is displayed in white, uppercase letters on a solid blue background.A row of four logos for Intuit's partners: TurboTax (red checkmark icon), Credit Karma (green 'ck' icon), QuickBooks (green 'qb' icon), and Mailchimp (yellow monkey head icon).

Intuit, has launched a new insights tool for tax professionals to deliver tax advisory services. The [Intuit Tax Advisor](#) (ITA) system integrates with Lacerte and ProConnect Tax, to provide professionals with insights and strategies they can use to provide services to their clients.

“There is a clear need and appetite for creating more value for clients and firms, and ITA is designed to do just that.” [Tweet this](#)

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

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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

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