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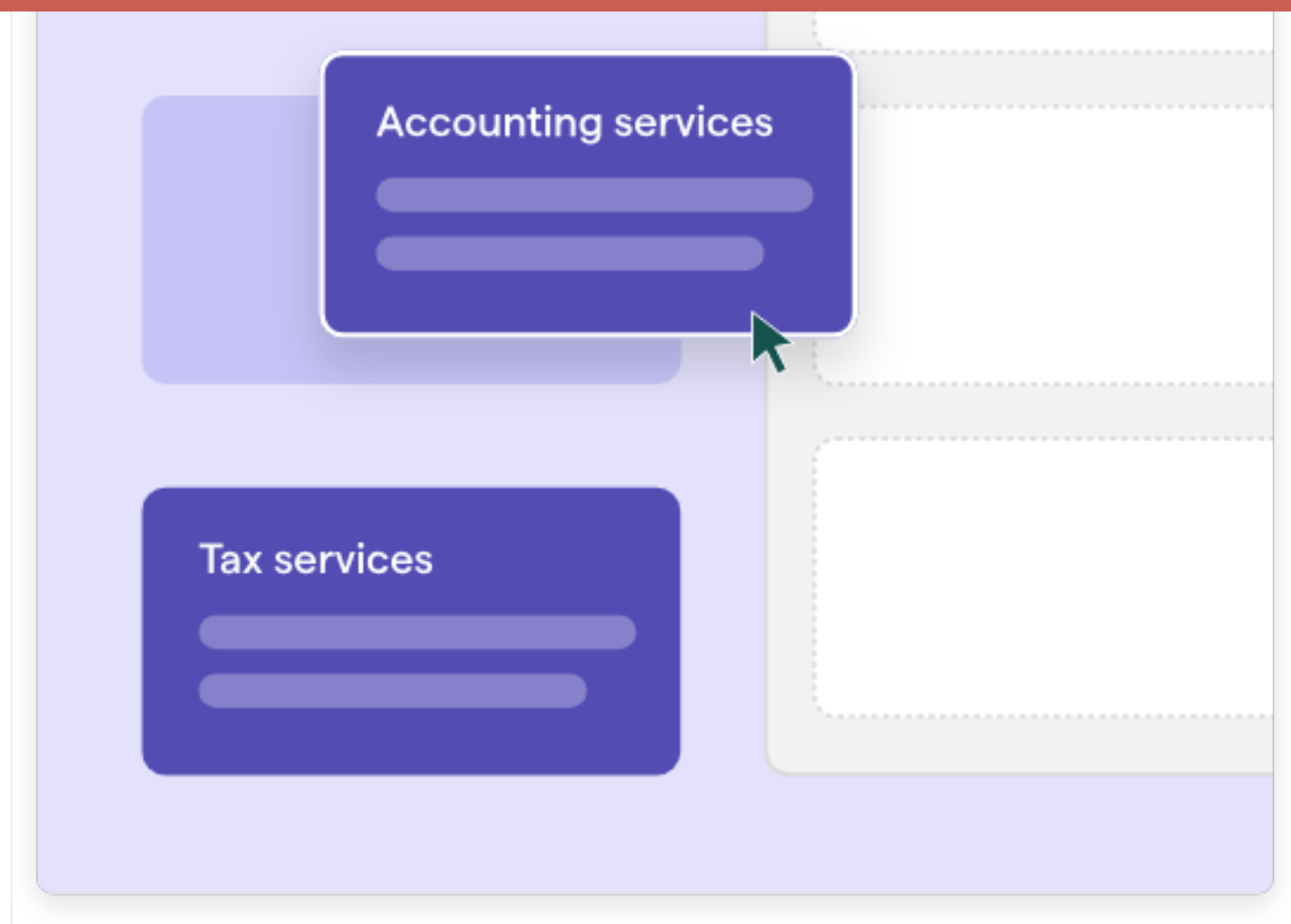
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ProConnect Group's latest product, Intuit Tax Advisor.

**Isaac M. O'Bannon** • Sep. 07, 2022

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**Ignition**, a client engagement and commerce platform, has partnered with **Intuit Inc**, to launch its Tax Planning and Advisory Proposal templates which integrate into Intuit ProConnect Group's latest product, **Intuit Tax Advisor**.

As tax professionals move to more year-round advisory services, Ignition recognized the need for an updated product that improves the way tax and accounting professionals engage with their clients. Elevating the experience for those in professional services, Ignition's Tax Planning and Advisory Proposal templates extend upon Intuit's recently launched Intuit Tax Advisor, which seamlessly

integrates with Lacerte and ProConnect Tax software to provide automated tax

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professionals on Intuit Tax Advisor can scope and sell their tax advisory services simply, efficiently and effectively at scale. Designed by Josh Lance, Managing Director at Lance CPA Group and Head of Accounting for Ignition, the templates are widely available for Ignition customers in the United States and can be found in the provided templates library. Key benefits include:

- **Winning more deals faster:** Eliminating the hard work for professionals, the templates offer a variety of pre-populated services and templates, pricing, and billing schedules.
- **Speeding up proposal timelines:** Reducing time spent on proposals, the templates are preloaded with all required information and can be customized based on client needs.
- **Seamless workflow with Intuit Practice Management and Quickbooks Online:** When clients accept services within the Ignition platform, it prompts the linked Intuit Practice Management template to automatically create a work item. At the same time, the templates automatically add clients in QuickBooks Online and invoices.

“The new templates in Ignition were developed to work with Intuit Tax Advisor and help tax professionals efficiently package and price their services from basic tax preparation to full-service tax planning and advisory services,” said **Josh Lance, Managing Director at Lance CPA Group and Head of Accounting for Ignition**. “This will save them time and help them engage with clients on a monthly basis to communicate the value provided from these additional services.”

This product reveal comes on the heels of [Ignition and Intuit's partnership announcement in April 2021](#) and extends upon the existing Ignition and Intuit Practice Management offering, streamlining client onboarding workflow. With a collective goal of helping clients scale their revenue while reducing time spent on

administrative tasks, the ongoing partners aim to champion accounting and tax

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For additional information on the integration and Ignition Tax Advisory Proposal templates, visit [www.ignitionapp.com/templates/tax-planning-and-advisory-individual-proposal-template](https://www.ignitionapp.com/templates/tax-planning-and-advisory-individual-proposal-template). For more information on Ignition, visit [www.ignitionapp.com](https://www.ignitionapp.com).

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