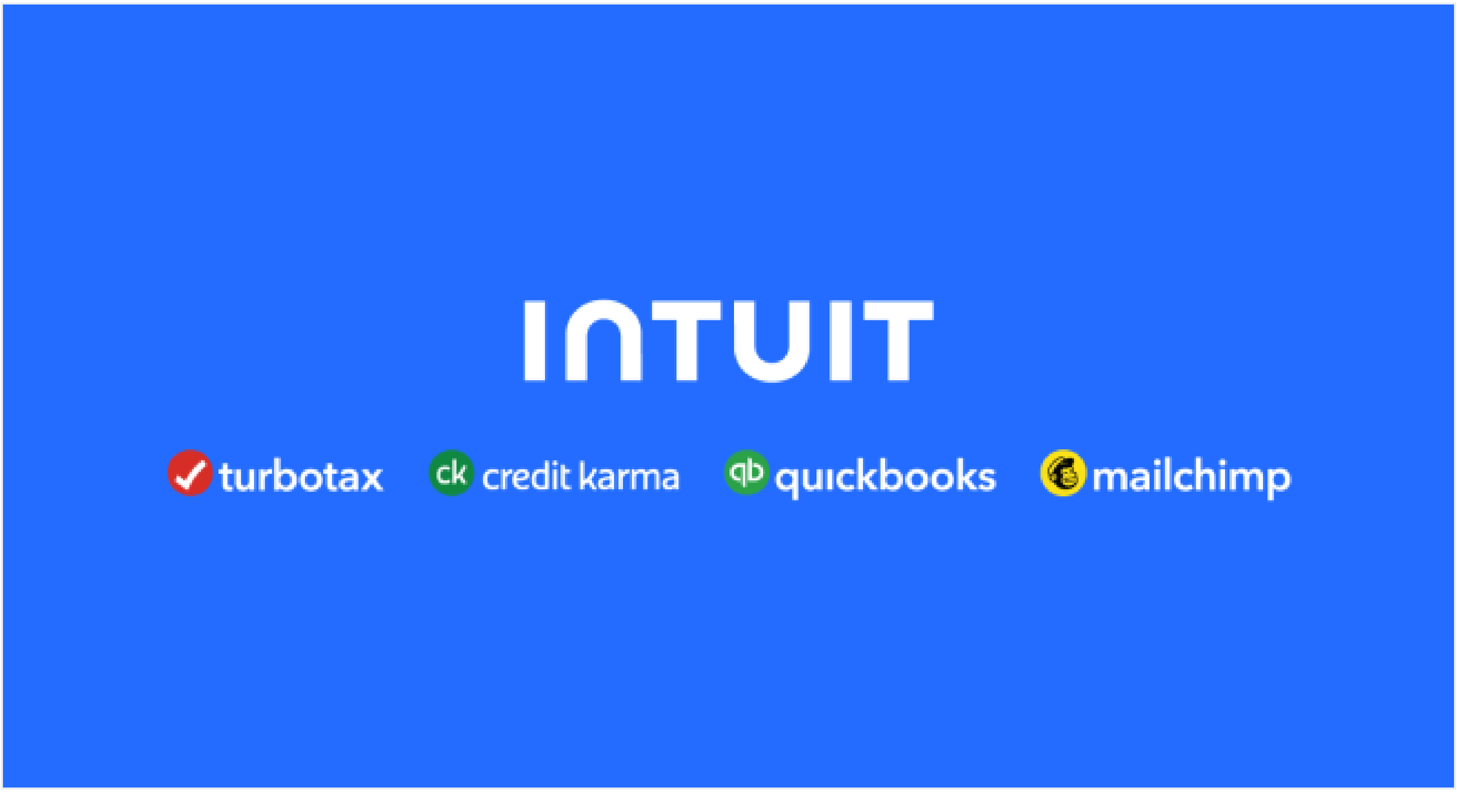
CPA Practice Advisor

Strategies

With the integration between Lacerte and ProConnect Tax, client data is automatically mined to bring significant time savings to your practice and more accurate tax projections for your clients.

Oct. 06, 2022



Having helpful, always-on tools to give your clients the information they need to make more-informed decisions is a key component of delivering advisory services to your clients. With the new Intuit Tax Advisor (ITA), the process is easier than ever—and right at your fingertips.

Thanks to the seamless integration between ITA and Intuit ProConnect Tax and Lacerte Tax, you'll get vital insights and strategies to help your clients. Bringing tax prep and advisor tools under one roof, ITA allows you to create personalized tax planning that offers value-added services to your clients, including tax savings and

To get a sense of the value and impact this tool can have, here are some of the biggest benefits regarding ITA.

Automated Data + Powerful Integration = Time Savings and Accurate Tax Projections

With the integration between Lacerte and ProConnect Tax, client data is automatically mined to bring significant time savings to your practice and more accurate tax projections for your clients. In the process, all legislated tax law updates are incorporated into the software's planning and projections, with built-in compliance.

All of this not only reduces audit risk, but also eliminates the time it takes to perform cumbersome tasks that keep you from helping your clients run and grow their businesses.

"Based on customer feedback, we designed Intuit Tax Advisor to help advisors save time and scale their planning services to more of their staff," said Jorge Olavarrieta, vice president of product management and design at Intuit ProConnect Group. "Tax professionals can simplify proactive tax planning and advisory services with ITA to replace the current process of cobbling together tax planners, spreadsheets, and reporting applications."

Personalized Tax Planning Strategies

Packed inside ITA is an endless number of strategies that can take your practice—and your clients—to the next level.

For example, ITA gives you hundreds of potential triggers in your clients' tax data that show smart strategies for you to implement for your clients. Whether you choose to use them or dismiss them is your call, but you can also create your own strategy in minutes, and save and modify your strategies at any time. In addition, you

your personalized tax planning strategies and estimated savings plan for them, turning something complex into something easy to understand.

Before sending out the report, you can customize it in a professional way with your firm brand. Choose logos and colors that represent your practice, and update it year-round as things change or you're feeling creative.

Simple Pricing

When it comes to pricing for ITA, it's simple. To start generating custom tax plans for a client, customers just need to purchase a client credit. One client credit equals unlimited tax plans for that client within a calendar year. Customers are eligible to reserve three free client credits.

More Resources to Get You Started

ITA is a win-win for you and your clients. With ITA, you get the foundation to offer transformational tax advisory services that help your clients save time, save money, and strategize for long-term growth. In doing so, these value-added services will boost profits and productivity for your practice, while also bringing measurable savings and more accurate planning to your clients.

To check out the new tax advisory resources library for a step-by-step guide to offer tax advisory in your practice, visit https://proconnect.intuit.com/taxprocenter/practice-management/tax-advisory-resource-library-now-open-online. And for more information on Intuit Tax Advisor, visit https://proconnect.intuit.com/tax-advice-planning-for-professionals.

Benefits • Firm Management • Income Tax • Sponsored Content • Taxes • Technology

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy