

FROM INTAKE TO DELIVERY

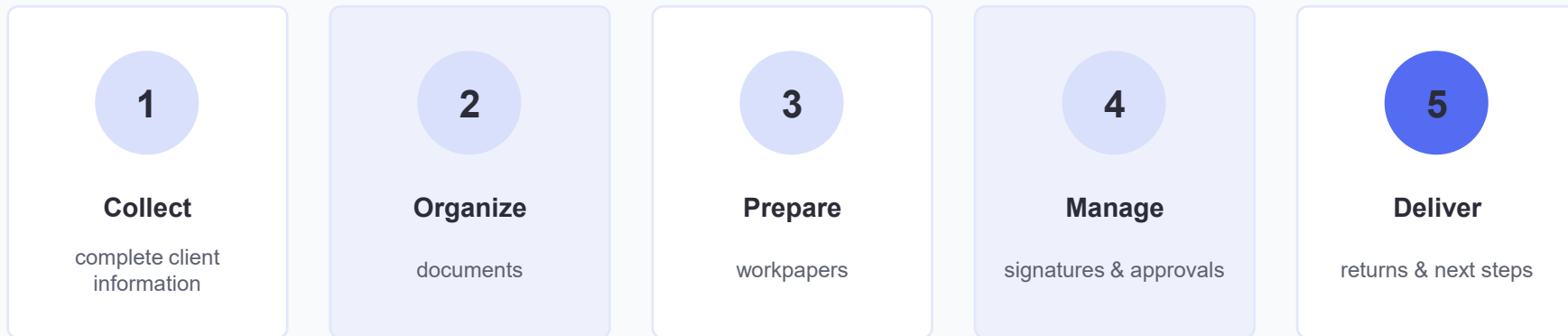
Building a More Efficient Tax Workflow

Reduce handoffs. Remove manual work. Create a more connected client experience.



The real tax season bottleneck isn't always tax prep.

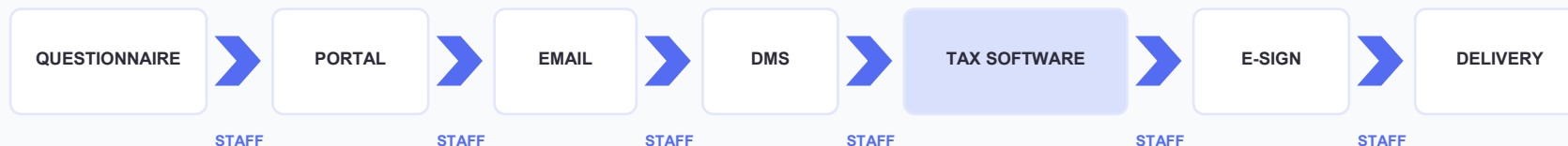
It's the operational work happening around the return.



The opportunity: reduce friction across the entire client journey—not just one task.

Every handoff creates another opportunity for friction.

The tools may work individually. The problem is what happens between them.



Staff often become the “integration” between disconnected systems.

Every transfer introduces a chance for something to be missed, duplicated, delayed, or manually reworked.

Most workflow problems show up in four predictable places.

01

Incomplete intake

Missing answers, documents, and client information

02

Document chaos

Unlabeled, combined, duplicate, or scattered files

03

Prep friction

Too much manual sorting and workpaper organization

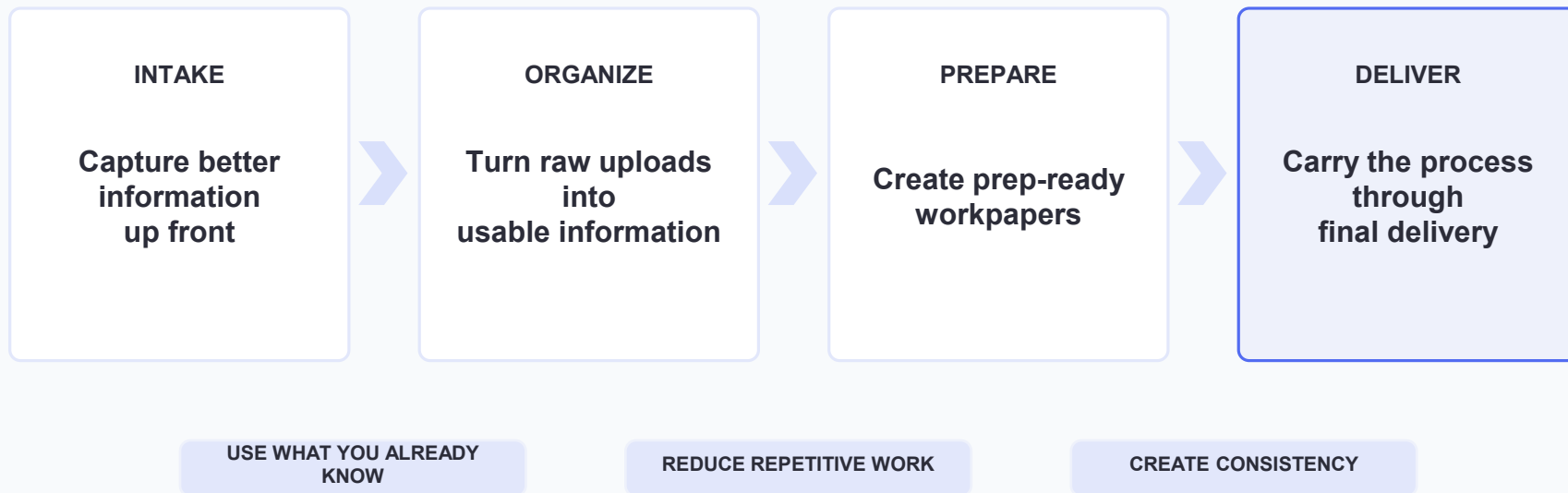
04

Delivery drag

Multiple steps for returns, signatures, K-1s, and reminders

The question isn't whether these tasks exist. It's how many of them still need to be manual.

Think beyond individual tasks. Connect the entire client journey.



AI should reduce manual work, not add another workflow to manage.

BEFORE PREP



Personalize client intake



Identify + organize documents



Create structured workpapers

AFTER PREP



Automate delivery steps



Place + route signatures



Trigger K-1s + reminders

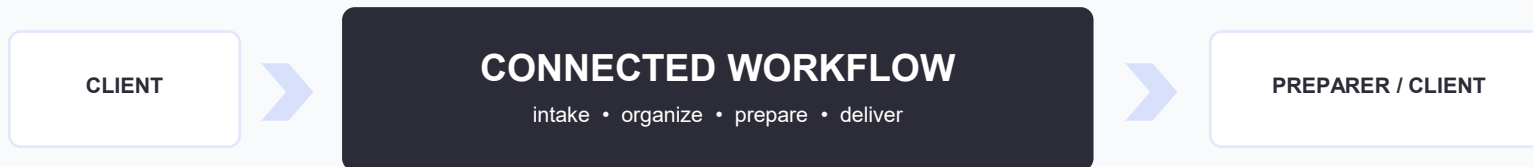
Does it remove a step... or just move the work somewhere else?

Reduce the number of times staff have to connect the dots.

TRADITIONAL



CONNECTED



Human time stays focused where it creates value.

NOW, WATCH THE HANDOFFS

Let's walk through the workflow.

- Customizable questionnaires
- Prior-year-driven intake
- Intelligent document processing
- Prep-ready workpaper binders
- Tax return summaries
- Secure return delivery
- Automatic e-signature placement
- K-1 distribution + estimated tax reminders

Reduce handoffs • Reduce manual work • Create a more connected experience