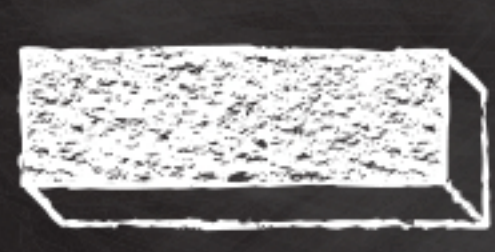


The formula

✓ to future-proof your practice.



It's as simple as addition and subtraction to stay ahead of the curve.



SUBTRACT ADMINISTRATIVE, TIME-CONSUMING TASKS.

Leave the tedious tasks to automation, so you can free up your time for more valuable advisory services.

FROM

TO

Entering data manually, which slows you down and increases the risk of errors and inaccurate data.

80%

Using automation to avoid manual data entry, joining **80% of pros** who say it's in their top three most exciting tech improvements.¹

Collecting small-business client data by mail, email and desktop files.

24h

Accessing small-business client data directly from QuickBooks in real time to **save 24 hours per month** on average.²

Tracking time manually for hourly billing that disadvantages innovation and efficiency.

28%

Billing based on the value you provide, joining **28% of tax and accounting pros** like you who already benefit from fixed fees.³

Using traditional organizers and constant reminders to chase down client data.

30%

Using a digital portal with automatic reminders to get client data **30% faster**.⁴



ADD ADVISORY SERVICES.

Take action on these three ways to lead your practice into the future with the valuable support your clients seek.

1

Lead with tax planning.

Help your clients save money and prosper by providing proactive tax planning and business reviews – to truly be the trusted advisor they rely on.

2

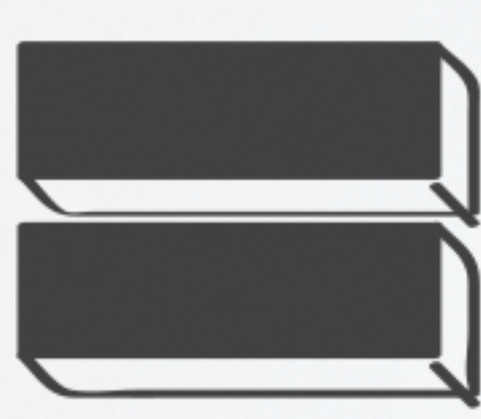
Create an advisory workflow.

Tap into tech – particularly the cloud – to connect with clients and give them automated reports and insights that help them achieve their goals.

3

Deliver bundled services.

Boost your business plan by packaging up services for tax strategies, advising and compliance so you can communicate your true value to clients.



SOLVE THE EQUATION

Less time on low-value work + more time on advisory services = countless benefits for you and your clients. Here are just a few.

FOR YOUR BUSINESS CLIENTS

Better cash flow, thanks to your guidance on ways to save and plan ahead.

More efficiency, thanks to your help with automating processes on the cloud.

Strong growth opportunities, thanks to your planning guidance and insights.

FOR YOUR PRACTICE

Stronger impact, thanks to the deep expertise and valuable advising you bring to clients.

Higher revenue, thanks to pricing that matches the high-value, bundled services you provide.

More capacity, thanks to automating low-value tasks and gaining efficiency on the cloud.



Get the answers with a formula customized for your practice at:
proconnect.intuit.com/tax-practice-of-the-future

