INTUIT Accountants

Tax Season Briefing:

Intuit ProConnect Tax

Tracy Griggsby-Leonard
Staff Product Manager
ProTax Group, Intuit

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Staff Product Manager, Intuit ProTax Group



- 12 years in the Tax industry, 11 of those years with Intuit
- Experienced with training tax professionals and top-performing expert teams within the tax space
- My work is focused on making you more successful, leading initiatives that boosts firms' confidence in ProConnect Tax being the right fit for them
- My goal is to empowered tax professionals by creating tools focused on firm growth

Participating

Webinar housekeeping

Webcast best practices:

- Webcasts will stream audio **exclusively through your computer speakers**.
- We recommend using **Chrome** or **Safari** for the best experience.
- Do not use any VPN, AdBlocker, or a Firewall (such as McAfee) **OR** instead use Incognito Mode in your browser.

Survey:

- As the event is wrapping up, you will be prompted to take a short survey.
- Please complete this before you leave as your feedback is very valuable and appreciated.

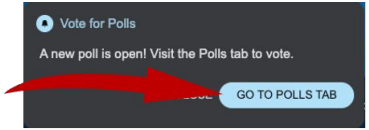
Note: A recording of this presentation will be available using the same magic link login shortly after the session concludes.

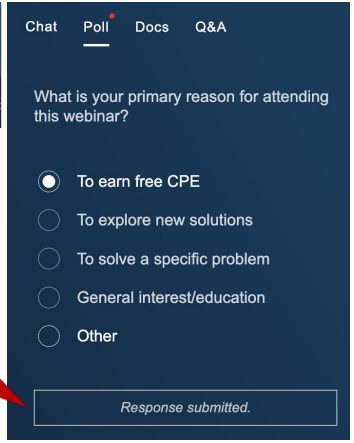
Participating in Polls

Two ways to answer the polling question

When a poll is launched, you will see a pop up on your **LOWER LEFT AREA** of the event window.

Click **GO TO POLLS** to be taken to the tab **OR** click on the **POLLS TAB**



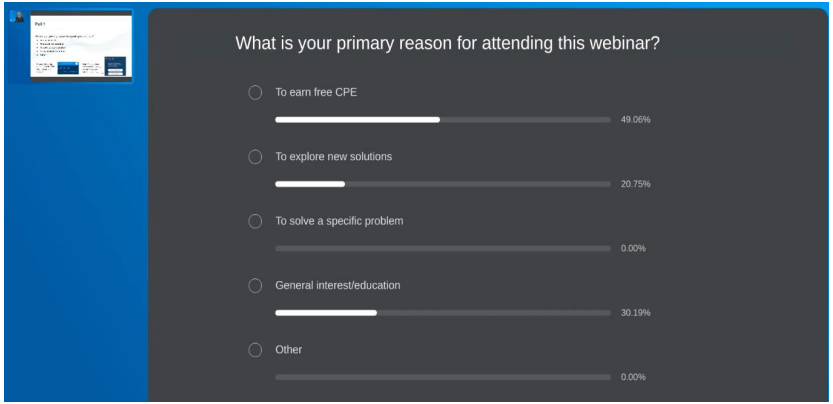


SELECT your answer and click **SUBMIT**

OR

Once the speaker has announced a poll. It will appear appear on your screen.

Select radial button for your answer. **If you missed this on the main screen**, you can still vote by going to the **"POLL"** tab in the upper right area next to chat and messages.



NOTE: Once the poll has been closed, the POLL TAB will no longer appear until a new poll is launched.

⚠ Disclaimer

- **This session is educational in nature and should not be construed as tax advice.**
- The information presented is believed to be accurate but is based on very recent legislation that is changing with agency guidance.
- We have no obligation to update attendees, and we encourage you to monitor authoritative guidance for updates.
- Every client situation is unique and tax professionals should carefully consider the facts and circumstances of each client in applying the tax laws.

CPE & CE Credit

This session is eligible for 1 CPE credits and 0 IRS CE credits.

Requirements

- 4 Interactive polling questions will occur throughout.
- To receive CPE credit, you must:
  - Answer 3 polling questions*
  - Attend a minimum of 50 minutes.

* Minimum 3 polls, but we'd appreciate you answering all the polls.

Only LIVE webinars are eligible for credit (viewing the recorded webinar later as on-demand is not eligible).

Course Certificate

- If all requirements are met and this session provides CPE/CE credit, certificates will sent to the email you provided during registration.
- Certificates will be sent within 48 hours via Certifier.
- Check Junk / Spam if not received within 48 hours.
- For CPE/CE questions, contact ProTax_Training@intuit.com, provide details including webinar title and date you attended.


Certificate of completion

INTUIT
2535 Garcia Way
Mountain View, CA 94043
NASBA Sponsor registry number 103311

Kevin Malone

Has successfully completed the training:
Desk Tidying Strategies

In the field of study:
Office Management

Dated: 2024-09-06
Recommended for: 1 CPE
Delivery method: Group - Live Internet

In accordance with the standards of CPE Sponsors and Quality Assurance Service Programs, CPE credits have been granted based on a 50-minute hour.

Ted Callahan
Accountant Segment Leader, Small Business Self-Employed Group

NATIONAL REGISTRY OF CPE SPONSORS

CE Continuing Education
Approved IRS Provider

Intuit is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.NASBARegistry.org.

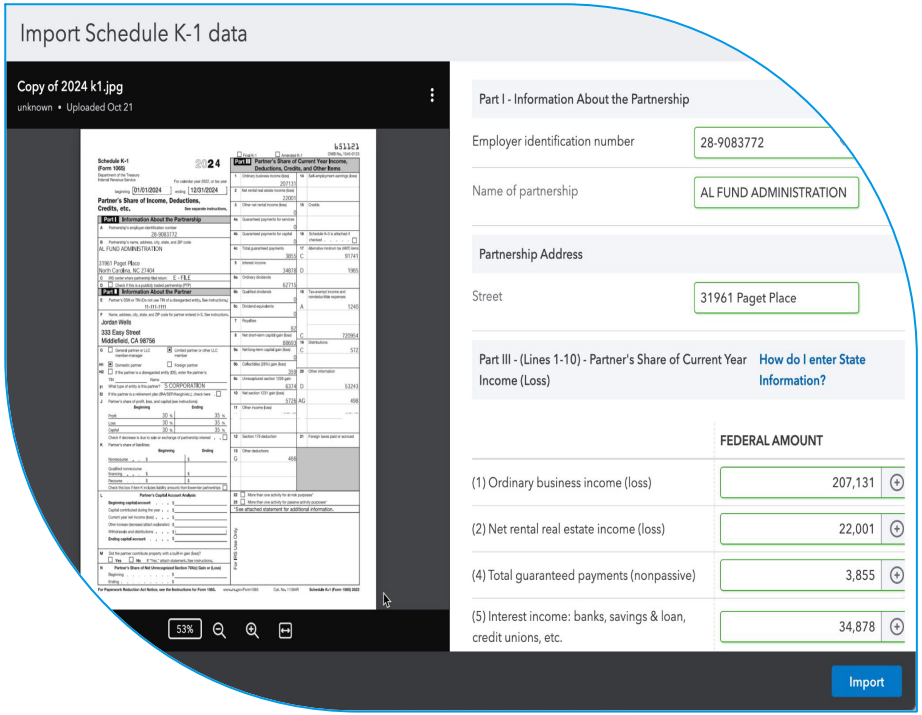
New to ProConnect Tax

Federal K-1 Import

Available for 1040 returns

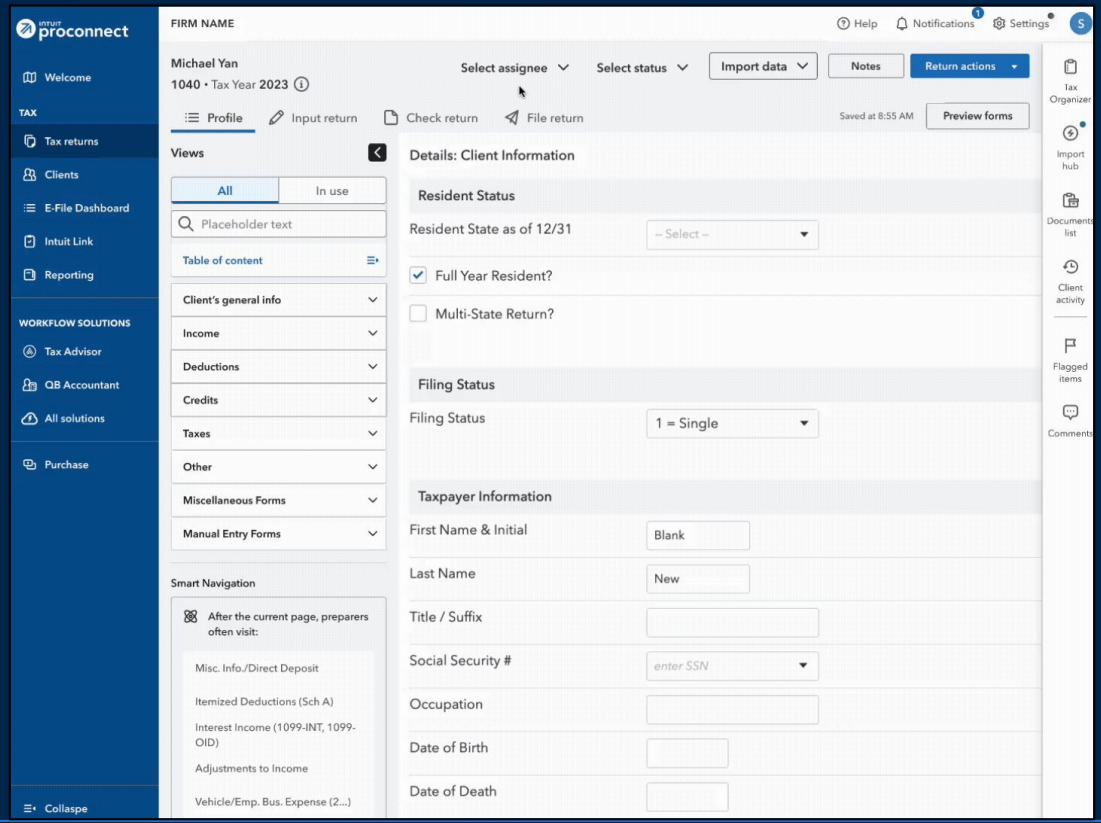
With ProConnect Tax, you can now import data from Schedule K-1 forms created in other tax preparation software directly into an individual tax return (IND).

- **We currently support the first page of Federal Schedule K-1 form from Partnerships (1065), S Corp (1120S), and Estates and Trusts (1041).**
- **K-1 imports are supported for individual returns (IND) only.**
- **Accepted file formats for document upload: .jpeg, .jpg, .png, or .pdf.**



This feature uses AI data mapping Data extraction accuracy is being measured.

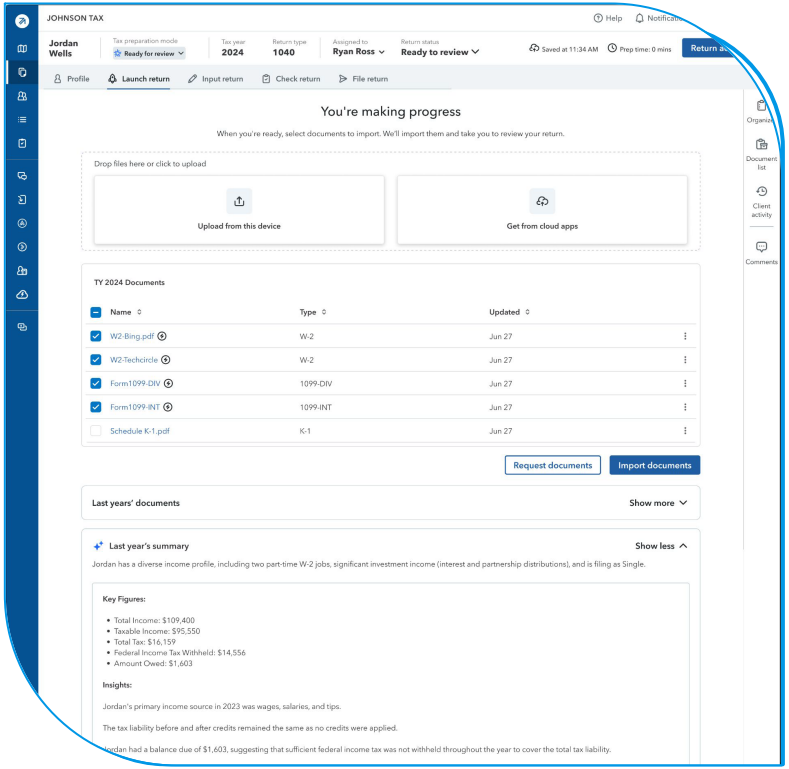
Federal K-1 Import



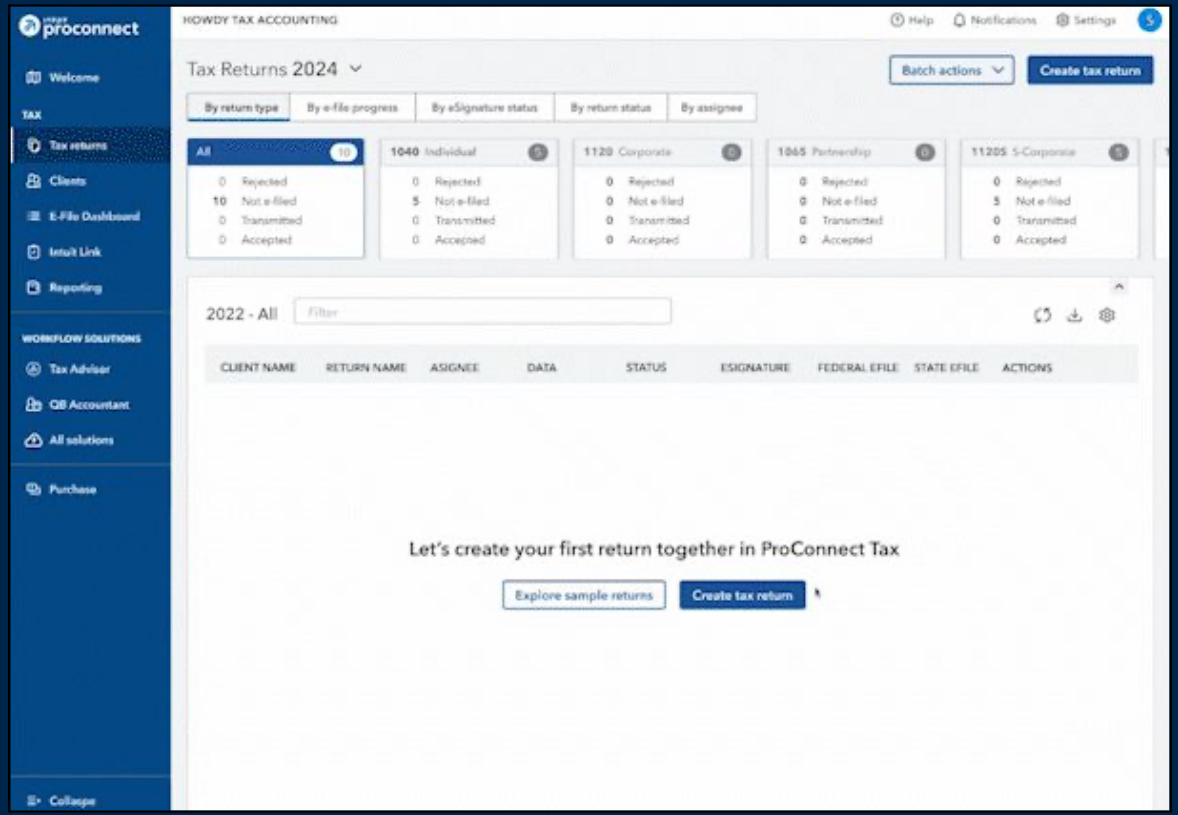
Ready for Review

Import all eligible documents with ***one click*** and review the output on the 1040

- **Leading with Import**
  - Upload PDFs/Image Files via local, cloud storage and **Link**
  - Drag and drop documents into the return
  - Import all eligible documents with a simple click
- **AI client summary** (AI prior year summary) to help with confidence in document checklist.
- **Preview forms** leveraging current 1040 Jump to input experience to highlight source docs and input.
- **Toggle experience** seamlessly switch between the new "Ready to Review" view and Input with a simple click of a Tab



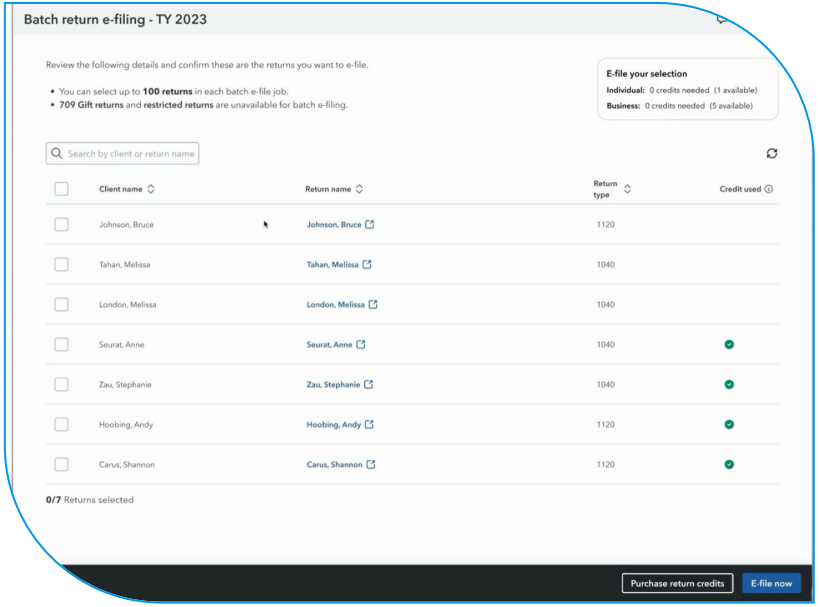
Ready for Review



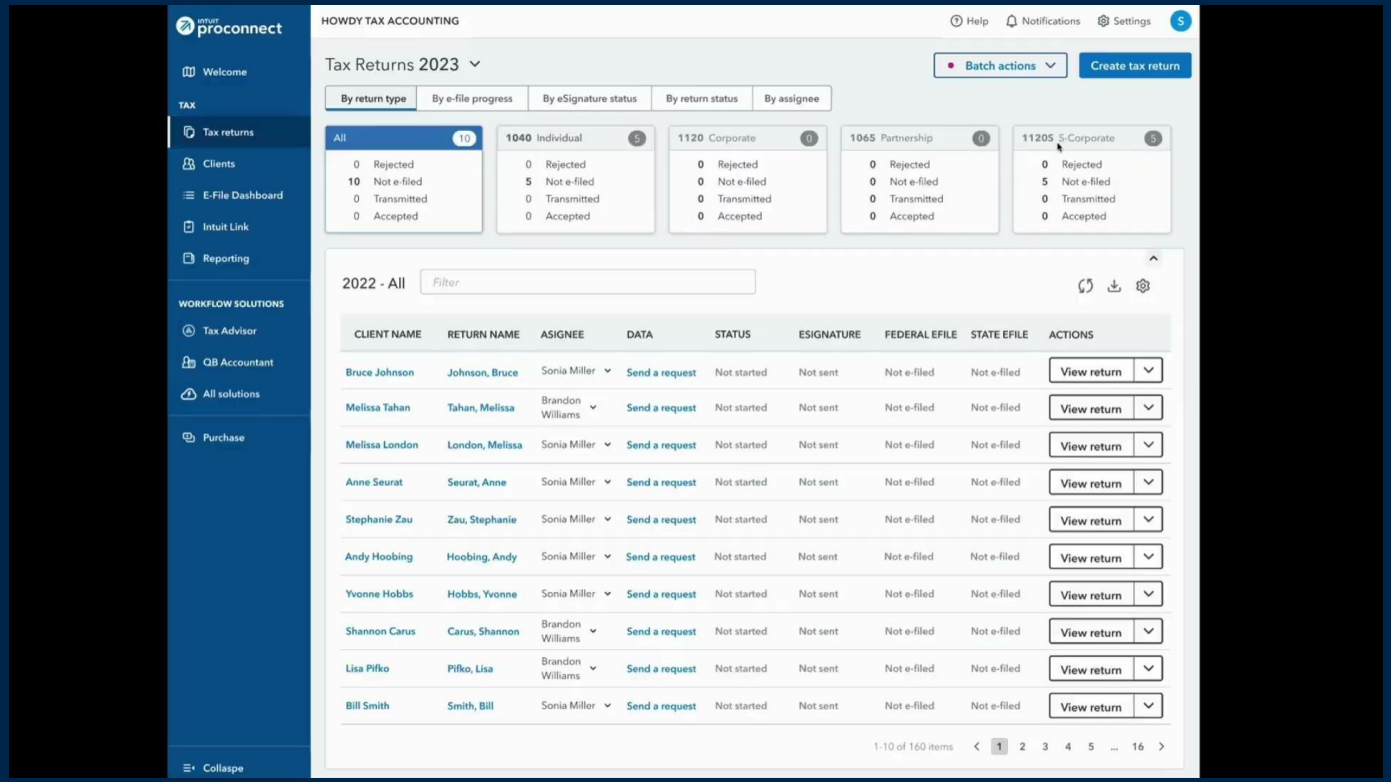
Batch e-file

Save time by eliminating the need to individually e-file each return.

- Users can add a tax return to a batch.
- Users can review all the tax returns in a batch before e-filing them together.
- Users can track the status of a e-filed batch.
- Systemic checks and balances to prevent edits after adding a return to a batch, manage user access constraints, and resolve diagnostics.

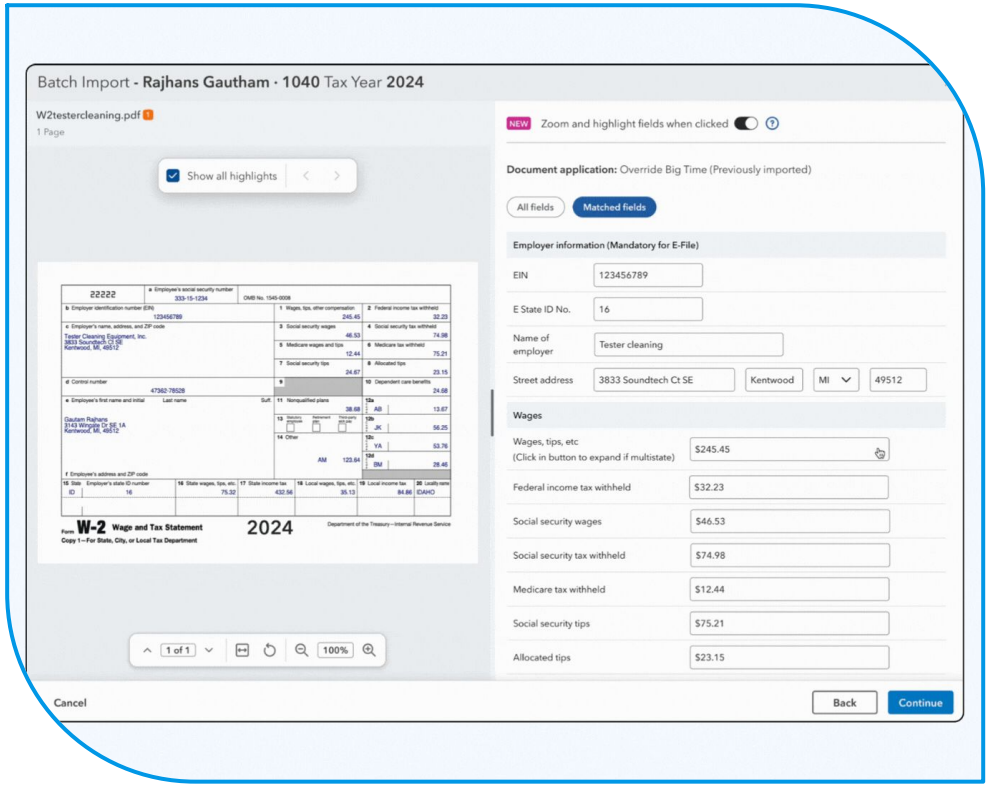


Batch efile


intuit proconnect
HOWDY TAX ACCOUNTING
Help
Notifications
Settings
Welcome
TAX
Tax returns
Clients
E-File Dashboard
Intuit Link
Reporting
WORKFLOW SOLUTIONS
Tax Advisor
QB Accountant
All solutions
Purchase
Collaspe
Tax Returns 2023
Batch actions
Create tax return
By return type
By e-file progress
By eSignature status
By return status
By assignee
All 10
0 Rejected
10 Not e-filed
0 Transmitted
0 Accepted
1040 Individual 5
0 Rejected
5 Not e-filed
0 Transmitted
0 Accepted
1120 Corporate 0
0 Rejected
0 Not e-filed
0 Transmitted
0 Accepted
1065 Partnership 0
0 Rejected
0 Not e-filed
0 Transmitted
0 Accepted
1120S S-Corporate 5
0 Rejected
5 Not e-filed
0 Transmitted
0 Accepted
2022 - All
Filter
CLIENT NAME
RETURN NAME
ASIGNEE
DATA
STATUS
ESIGNATURE
FEDERAL EFILE
STATE EFILE
ACTIONS
Bruce Johnson
Johnson, Bruce
Sonia Miller
Send a request
Not started
Not sent
Not e-filed
Not e-filed
View return
Melissa Tahan
Tahan, Melissa
Brandon Williams
Melissa London
London, Melissa
Anne Seurat
Seurat, Anne
Stephanie Zau
Zau, Stephanie
Andy Hoobing
Hoobing, Andy
Yvonne Hobbs
Hobbs, Yvonne
Shannon Carus
Carus, Shannon
Lisa Pifko
Pifko, Lisa
Bill Smith
Smith, Bill
1-10 of 160 items
1 2 3 4 5 ... 16

Click to Zoom

An enhanced data import review process that allows you to zoom and navigate to each extracted field from a W-2, allowing you to review the imported data faster.



Additional new features

Prior year 1040 import

Apply a prior year 1040 tax return's data to create a new return (or to an existing return) and generate a tax summary comparison.

Bulk apply

Import data from multiple documents all at once, rather than one source at a time.

In-return guidance

Access the help section with articles, videos, and contacts built into the right panel to guide you.

Learn more about new ProConnect features

Integrations

Intuit Tax Advisor

Included with ProConnect

All ProConnect firms will have access to Intuit Tax Advisor:

- Create a new tax plan, quarterly estimated projected payment plan or open existing plans for all clients
- No additional cost starting with ProConnect-Tax Year 2024

Intuit Tax Advisor

Included with ProConnect

Built into the tax program

- Intuit Ecosystem Data flow: First-in-class Books to Tax to Advisory
- Streamline the process of creating tax plans for optimal efficiency
- Access the cloud-based platform directly from your tax program for convenient use

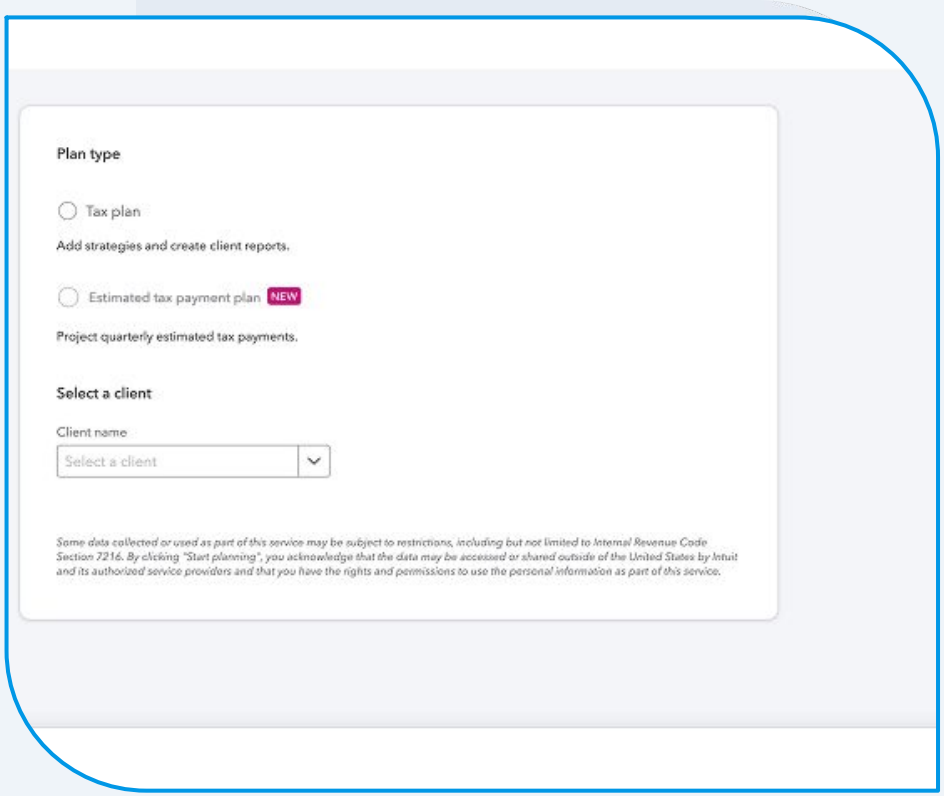


Intuit Tax Advisor

Included with ProConnect

Offer client-friendly tax planning reports to all your Individual clients

- Expertly designed custom tax plans developed within minutes
- Tax strategies automatically generated from your client's tax return data that factor Federal and Resident State tax savings
- Communicate directly with clients to highlight the significant savings and Return on Investment (ROI) achieved through advisory services



Quarterly estimated payment projections

What does Intuit Tax Advisor offer?

Included with ProConnect

Strategies

50+ Strategies
Growing repository of strategies that can be applied directly to the tax return.

Client Report
Add tax strategies to a plan and see savings from each strategy on a client-friendly report.

States Pre-Strategy Baseline
Nail the basics: Plan for 10+ states on the PSB. Ensure conformity across states for top strategies.

Duplicate Plan
Simulate various scenarios by duplicating the Tax Plan for the client.

Business Income Projection
Coming soon!

2025 Projections

Simple 2025 Projection
Without duplicating a return in Lacerte or PTO, ITA becomes on-ramp to full Planning.

Quarterly Tax Payment Projection
ITA calculates the Projected Penalties and allows you enter the payment dates for precision.

Wages Projection
Client changed jobs and wants help to know how much more to withhold? Use wages projection in ITA.

Projection Drilldown
Drill down into any activity on the Federal projection to see inputs in a PTO-like view.

State QEPP
Ongoing planning: Quarterly Estimated Projected Payments for States that reside in the Client report.

Business Planning

S-Corp Basis tracking
Business planning: Track stock and debt basis as you apply various income/expense changes and strategies during planning.

1065 basis tracking
Business planning: Track partner basis as you apply various income/expense changes and strategies during planning.

QBI deduction tracking
Business planning: Strategize the optimal QBI deduction by using the QBID analysis worksheets for an entity by entity view of QBID impact.

PTET for CA & NY
Simulate to confirm that electing the PTET would be the right choice for your clients.
More states coming soon!

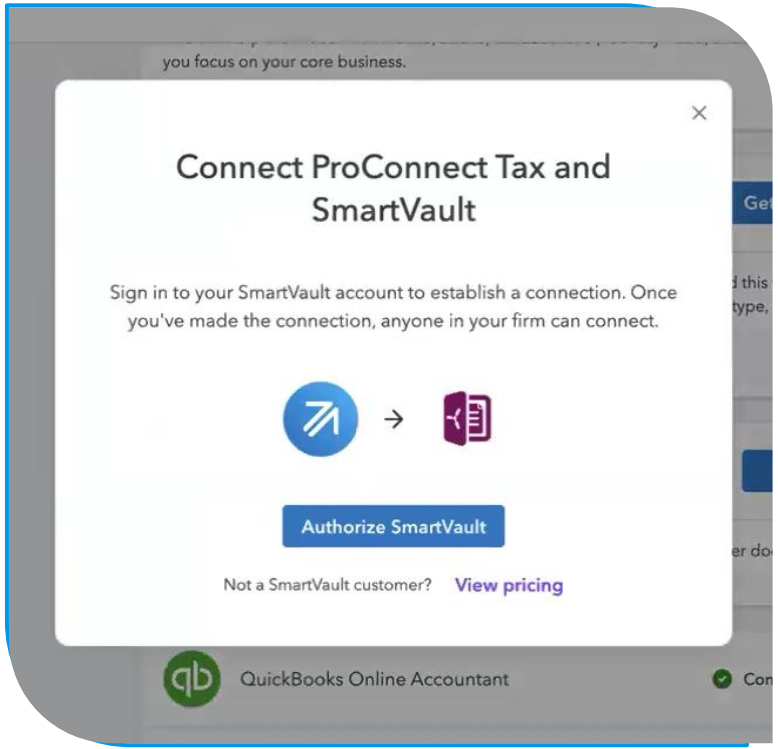
Grow Advisory

Client Prospecting
Business planning: Use OneView to datamine return data to ensure the likelihood a prospect will engage for advisory services.

Partnerships | SmartVault

Connecting SmartVault directly with PTO for an seamless Direct Print-to-SmartVault experience.

- **Smartvault integration connection** for Primary Admins and Advanced Tax users with 3rd party integration permissions have access
- **Direct Print-to-SmartVault:** After filing a tax return, users can now select "send to SmartVault" directly within the ProConnect interface. This action automatically routes and files the tax return (e.g., client copy, preparer copy) into the correct client and tax-year folder using a tag-based system, ensuring consistent organization.



The new Intuit Platform for QuickBooks Online clients

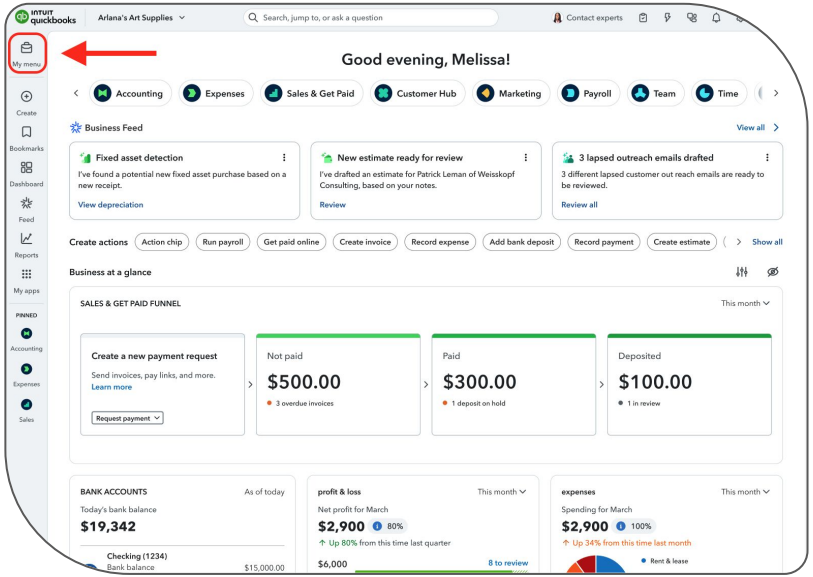
Beginning August 4, 2025, accountants on the new Intuit Platform in clients' company files can customize their Accountant tools

Beginning August 4, 2025, accountants on the new Intuit Platform in clients' company files can customize their Accountant tools, now called **My menu**, located at the top of the left side navigation bar.

- As an accountant user, you can use **My menu** to more easily access your most-used bookmarks, tools, and actions.

In the new QuickBooks navigation,

- Accountant tools is now re-named to My menu. The My menu button is located at the top of the left navigation pane and has the same familiar icon previously used for Accountant tools.

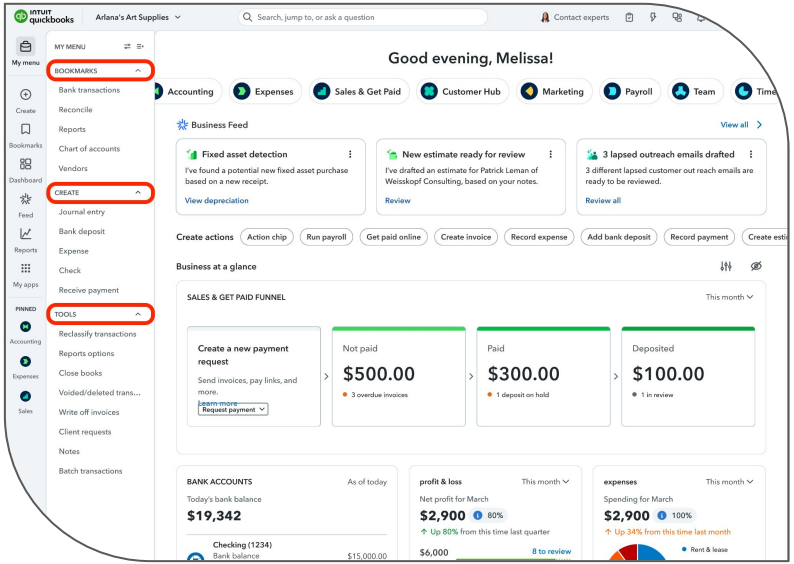


The new Intuit Platform for QBO clients

Beginning August 4, 2025, accountants on the new Intuit Platform in clients' company files can customize their Accountant tools

My menu, is an updated version of Accountant tools:

- **Prep for taxes:** Review your client's accounts and make adjusting journal entries at the end of the year. This works just like a traditional trial balance.You can also map and export your client's accounts to ProConnect Tax Online.
- **Reclassify transactions:** Edit or move multiple transactions at once.
- **ProConnect Tax Online:** Start new tax returns for clients in ProConnect Tax Online.
- **Write off invoices:** Cancel and zero-out bad invoices that won't get paid.
- **Reconcile:** Reset a reconciliation and start over fresh.
- **Reporting options:** Set default date ranges and filters for financial reports.




INTUIT
Accountant Suite

Support and Community

Intuit Accountants Support

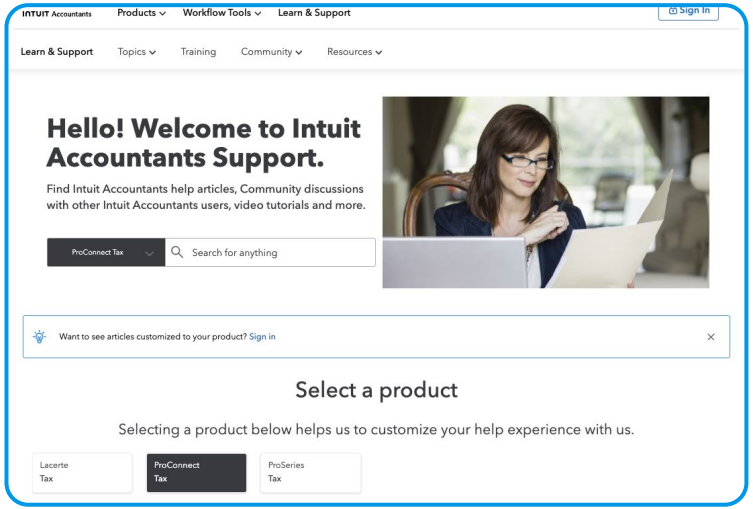
- Get answers to tax/product questions from Intuit Accountants.
- Access and search directly through program guides and resources.

  https://accountants.intuit.com/support/en-us

Explore the community

- Post your product and workflow recommendations.
- Connect with experts and tax professionals like you to find answers, talk shop, and get inspired.

  https://accountants.intuit.com/community/



Looking for more free training & resources?

Education Center

From helpful product information, thought leadership training, and industry news, browse our full list of training and education resources in one convenient location, such as:

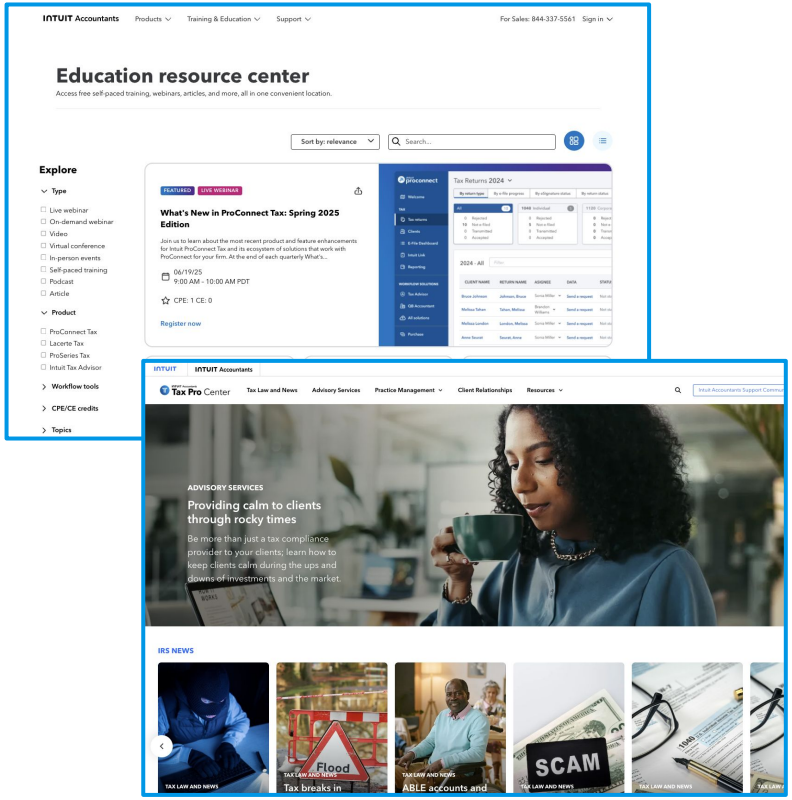
- Live and recorded webinars
- Virtual conferences
- Self-paced modules
- Important articles

https://accountants.intuit.com/training/

Tax Pro Center

Read articles on what's important and trending in the tax and accounting industry.

https://accountants.intuit.com/taxprocenter/



Wrap Up

- Survey
- Download handouts in Docs
- Your CPE Certificates will be emailed within 24 hours