



WHITE PAPER

Supercharge your firm
with client-focused
advisory services

Intuit® ProConnect™ Tax



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Executive summary



Picture this: You've just pressed "START" on a game of Super Mario Bros., guiding Mario through obstacles, collecting power-ups, and advancing to the next level. The cluster of pixels, aka Mario, is moving across the screen, hopping into green warp pipes to reach new heights and gobbling up mushrooms for power boosts. After a few tries to get everything just right, you've done it: You've reached level two.

Believe it or not, this small victory is not unlike the kind you can experience again and again as a tax professional. If you're a tax accountant looking to expand your firm and your revenue, there's one surefire way to do it.

No, it isn't installing a game player for your staff to play to blow off steam during tax season; the solution is to either launch advisory services or scale the advisory services you already offer. Adding advising to your tax game, so to speak, is one of the best ways to level up.  To reach that next level, whether you're Mario or an accountant, you'll need to implement a few strategies, from using technology as a power boost and launching tiered pricing, to jumping over hurdles.

Key issues highlighted in this whitepaper

Understanding how advisory service can benefit your firm: Expanding your business with advisory services can increase your annual revenue, putting you on track to earn significantly more than when you offered tax preparation or even a few other services. Perhaps even more significantly, changing your focus can help you develop better work-life balance by serving a lower client count, effectively decreasing stress levels and enabling you to feel more satisfied in your work.

Retaining and catering to your clients: A healthy business thrives by retaining anchor clients. In order to keep those clients, you

need to focus on your relationships with them—and prioritize the client experience. This two-pronged approach ladders up into a firm with outstanding advisory services.

Using technology to your advantage: You can't possibly know everything about advisory from the get-go. That's where technology and automation come in. By optimizing your workflows with sophisticated software and artificial intelligence, you can decrease your workload and make clients feel cared for—all at the same time.

How advisory services benefit your firm

As a professional financial expert, it makes sense that you would want to harness your expertise to move beyond tax prep. According to CPA.com's annual 2024 [Client Advisory Services \(CAS\) Benchmark Survey](#), advisory service growth is still on the rise, managing to outpace the tax profession's overall growth. Respondents to the CAS benchmark survey reported an overall median growth rate of 17% over the past year and a projected revenue percentage growth rate of 99% three years from now.

Aim for retention

You may have acquired another firm or joined with other firms. Regardless of your situation, the more you're able to retain ideal clients, the healthier your firm will be. Your clients factor into your Heart Points, or HP. ❤️ They keep Mario going as he navigates through each level of the game, much like your anchor clients keep you afloat as you continue to grow.

Offering advisory services with the help of tools such as [Intuit Tax Advisor](#) acts as a retention lever because it generates templates with lists of recommended actions clients should take to improve their tax burdens and financial situations, among other benefits. Using Intuit Tax Advisor with your clients will make them feel like they've received superior service, even though generating the results and guiding them through various scenarios didn't involve deep work on your end.

When you automate everyday tasks and manual bookkeeping processes with these kinds of tools, you gain time without losing billable revenue. Your clients will feel taken care of, and you can use that extra time to deepen relationships, increase retention, and dive deeper into the advisory services your clients need.

Standardize operations to help you focus on relationships

"When you standardize things, that's when you allow your work to become less cookie cutter," said Megan Leesley, Tax Director at [Dark Horse CPAs](#). "By doing this, you take the nitty-gritty processes out of the equation because the hard work is handled by the software. You're now more focused on that relationship with the client instead of the process itself."

A CPA.com [CAS Benchmark Survey](#) from 2022 found that “standardization enables team members to serve multiple clients without having to learn, or employ, new tools or procedures for each one. Limiting the number of general ledger accounting programs that the CAS practice supports is a key example of this simplification principle.”

The takeaway? Best practices suggest your firm should develop a prescribed tech stack with minimal choices and options available for clients. [Intuit ProConnect Tax](#) can streamline your workflow, while making routine reports and insights easily digestible for your clients.

Prioritize the client experience

Offering sound advice to your clients is only one level of the game. 🌟 It's imperative to focus on the experience you're creating for your clients in order to build and maintain your relationship.

In a [Firm of the Future article](#), Dennis Moseley-Williams, founder of Dennis Moseley-Williams Strategic Consulting, said, “If you're thinking about complementing your practice by offering financial planning to your clients, I'll share some advice: Financial planning is about more than money, business, and investing; it's about seeing the totality of a client's life and what's most important to them. More importantly, this process will be the compass that guides your client's transformation.




In other words, as a tax advisor, you want to make clients feel engaged, connected, and cared for when you work with them. In the end, they should feel transformed and enlightened by the interactions with you, their advisor.

“Where we’ve gone with compliance is where we need to go with advisory so we can focus on the human elements: communicating, identifying the opportunities for our clients, and helping them implement them in the most effective way possible.”

– Megan Leesley, Dark Horse CPAs

Understand each client's needs

Client advisory services run the gamut, from tax and estate planning to optimizing a business's payroll spending. For self-employed clients, you might advise on forms of ownership, helping clients understand why becoming an S corporation versus a sole proprietor might be tax-advantageous. Of course, you'll also need to advise them on reasonable compensation, so you can see how having one conversation on one aspect of their business can build more activity.

Yet, you can tap the brakes a bit.  What matters most is that you have a solid handle on what each individual client's needs are before you dive into advising. You can set yourself up for success by understanding each client's unique financial situation.

For Leesley, adding advisory services to her firm excited many of her clients. Two in particular, a husband-and-wife team with a booming veterinary business, felt like they found exactly what they'd been searching for.

"The couple bought a veterinary practice and were looking for a much more cohesive tax picture," said Leesley. "So I met with them four times a year to help them stay on track."

Since Leesley already had a clear picture of their tax outlook, she could tailor her advice to their needs. For example, she discussed hiring contractors versus employees, and what sorts of benefits they could offer to employees to save on taxes.

"Every time I talked to them, they said, 'Oh my gosh, thank you so much. This is amazing. This is exactly what we're looking for. We were told by our business coach that we needed to find someone—an accountant who was going to be involved on this level and was going to help us drive toward the goals we're trying to meet.'"

Consider lowering your client count to offer superior service

Advisory services aren't only offered by larger firms; many small- and mid-size firms also know the [value](#) they bring to advisory.

Trevor Betts is an enrolled agent with [Virtual Tax Solutions](#), who previously worked at a firm with his father. In that firm, father and son split their 1,000 clients evenly, managing to field countless phone calls and answer small questions. Now that Trevor has his own firm, his goal is to work with fewer clients and offer more personalized service.

"What I'm trying to do is bring the client count number and the number of tax returns down, so I don't have as many clients continuously reaching out," he said. "Then, I can make sure the number of clients I have—hopefully around 300—are really taken care of. I can focus on them and actually have quality client touchpoints throughout the year instead of just a phone call here and a phone call there. I can really focus on advisory services and schedule things out."

"On client surveys, I ask a bonus polling question to help clients gauge what they want besides what they're getting right now. When they answer with something like 'forget about it; it's only January,' I know those are the ones who just want their tax return done quickly rather than adding tax planning and advisory."

– Trevor Betts, Virtual Tax Solutions

Don't underestimate your abilities

You don't have to be a full-time gamer to get good at Super Mario Bros ... you just need to start and continue playing to sharpen your skills.

Similarly, you don't have to know everything about advisory services to begin offering them in your firm.



"Advisory is scary to a lot of people who have only done the compliance side of things," said Leesley. "They're like, 'Do I know enough? Can I do this? How do I get the information I need? Am I going to screw this up? What if I tell the client I'm going to save them \$20,000 and then I save them nothing?'"

The key to success is pressing "START." 🎮

"Find a good tool, such as [Intuit Tax Advisor](#), that will give you the efficiencies you need so that you don't have to spend a significant amount of time getting into advisory work," said Leesley. "You can start with a couple of strategies you want to get comfortable with and fully understand, and then go from there."

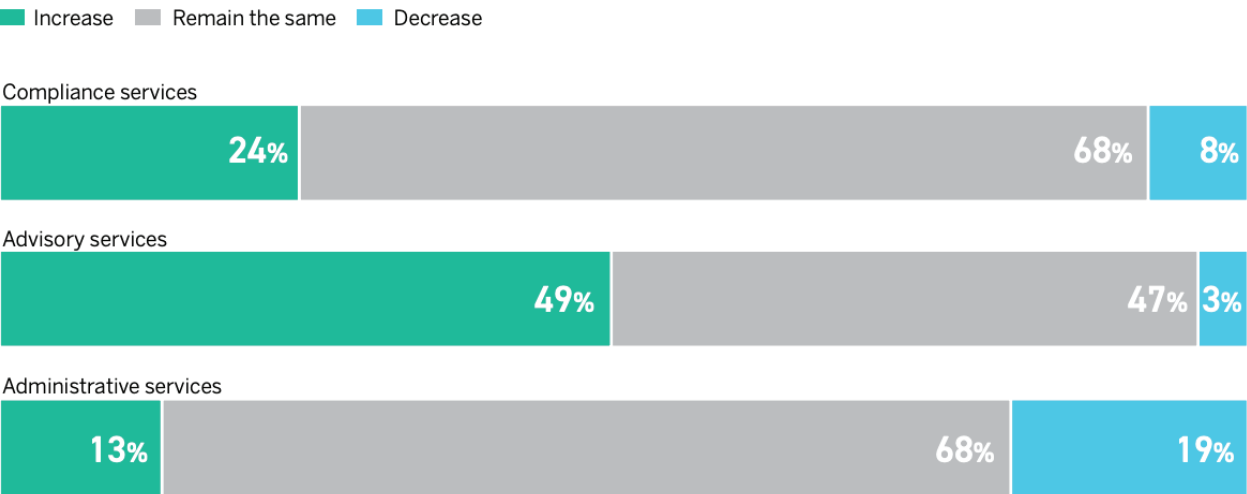


Watch your revenue tick up

Leveling up with advisory services can result in higher revenue for you and your firm—and it can continue to grow year after year. According to *Accounting Today*, 69% of firms surveyed in the magazine’s Year Ahead Survey [expect their revenue to grow by at least 4%](#). The area they most want to grow? Services outside of individual compliance work, namely advisory.

The study noted the following:

“Perhaps the greatest of these [growth factors] are evident in trends around the ongoing move across the profession toward a greater emphasis on advisory services and less of a reliance on compliance-related work. Fully half (49%) of the firms this year expect to spend more time on advisory work in 2025—exactly the same number that expected to do so in 2024.”



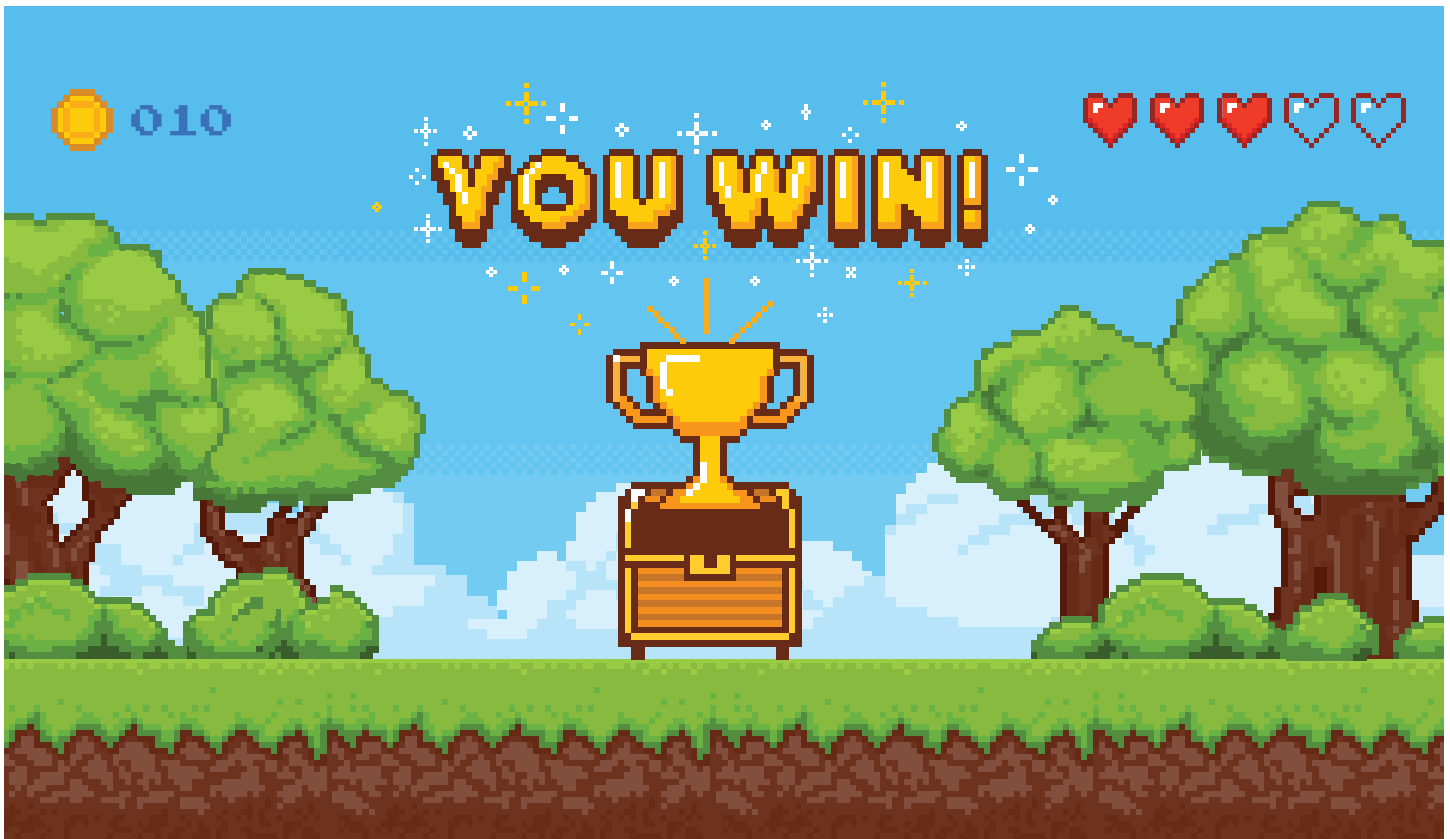
Source: Arizent, The Year Ahead Accounting Survey, 2024
Base: Total respondents projecting the year ahead n=291

Get a life: Reap the benefits beyond increased revenue


Another benefit of this expansion isn't as easily calculable: work-life balance. For Betts, the accountant who lowered his client count, combining advisory with tax planning has been a welcome change.

"The goal was to have more structure and better quality service instead of having 500 tax returns and trying to get them all out the door by April 15, and those on extension by October 15," he says, adding that bringing his client number down has resulted in less stress for him and, by association, his wife and their young family.

Decreased stress is an undeniable advantage. Still, adding advisory services can also make tax professionals feel more satisfied in their work. According to the AICPA, many accountants who formally offer planning services report high levels of growth and fulfillment. This is a significant asset when you consider that tax professionals are leaving the profession in ways unimaginable; more than 300,000 US [accountants quit their jobs](#) between 2020 and 2022, according to *The Wall Street Journal*.



Understand pricing your services

Any discussion about adding advisory to your practice wouldn't be complete without touching on pricing. If tools and technology are like Mario's mushroom power boost, then pricing is the warp pipe that helps you reach new heights. 

But how exactly should you charge for your advisory services?

The first step is moving beyond hourly billing, which can lead to unpleasant surprises. Often, clients may not know the scope of the work requested until they receive their invoice. Instead, consider value-based pricing, which groups services into packages, each with a set price. Your clients can choose the package that's right for them, allowing them to know the cost upfront.

Three-tier pricing

While there are a lot of possible sources as to the origins of where the "rule of three" or the "Goldilocks" model came from, the accounting profession refers to this as "three-tier pricing." You can look at it by framing your three tiers through the lenses of "good," "better," and "best."

Level 1–Good: Consider this level to be your most basic offering. It's simple tax preparation, accounting, and reporting, along with other services and deliverables the client is asking for.

Level 2–Better: To go a step beyond basic tax preparation, you can offer advisory work to clients in the "better" category. Services fall neatly between the basics and pulling out the stops, giving clients advisory in their areas of need.

Level 3–Best: This level is synonymous with luxury. Think high touch and high service. There is a high level of communication with your client throughout the year, and you're giving the full breadth of your expertise.

PRICING TIER	DESCRIPTION	SERVICES INCLUDED	IDEAL FOR	ESTIMATED PRICING
Level 1 – Good	Basic offering, essential compliance work	<ul style="list-style-type: none">• Tax preparation• Basic accounting and reporting• Compliance-focused services	Clients who just need basic tax filing and reporting.	Starting at \$500+
Level 2 – Better	Mid-level service with advisory add-ons	<ul style="list-style-type: none">• Everything in 'Good' tier• Advisory on key financial areas• Strategic tax planning• Periodic financial check-ins	Clients looking for some strategic guidance beyond compliance.	Starting at \$1,000+ (2x 'Good' tier)
Level 3 – Best	High-touch advisory and year-round engagement	<ul style="list-style-type: none">• Everything in 'Better' tier• Full business financial analysis• Regular tax strategy sessions• High-level financial planning & forecasting• Priority access & proactive recommendations	Businesses needing continuous advisory and financial optimization.	Starting at \$1,500+ (3x 'Good' tier) or 1-2%+ of client's gross revenue

According to the *Harvard Business Review*, the “good,” “better,” “best” approach has [two advantages](#):

1. Clients prefer having a choice instead of an ultimatum, and having three options gives them a sense of agency and empowerment.
2. When faced with multiple options, clients tend to decide more quickly whether they are going to buy something. Having made that mental shift, they typically treat the good version as a sunk cost, which makes them more amenable to upgrading.



Are tax firms different? Not so much. If your goal is to add advisory services to your practice, you'll need to think about how to price them so they are attractive, yet also are a good “fit” for your firm and your clients. So how do you decide on dollar amounts to attach to each level? After solidifying a value proposition for your firm, here are some key points to consider:

- One method is to take the amount you charge clients for basic tax preparation alone, and double or triple it based on your level of involvement. So, if you charge \$500 for basic tax preparation, you could assign a cost of \$1,000 to the “better” pricing tier. Similarly, you could charge \$1,500 or more for the “best” pricing tier, effectively earning 3x more than your original fee.
- According to *CPA Practice Advisor*, clients generally [accept that the total cost of accounting](#) is not more than 2% to 4% of the topline revenue for their business. As a real-world example for the “best” tier, you could also start with 1%-2%+ of the client's gross revenue. For a client with annual revenues of \$5 million, value pricing would be \$50,000-\$75,000.

“My vision is to transition my clients to a forward-thinking model, and have multiple client touchpoints throughout the year with a focus on tax planning and strategizing. The first step will be to overhaul my pricing structure to 3-tiered value pricing, with the end goal that I can provide higher quality service. It may mean that I lose clients, but I believe the model will give me a better work-life balance, while also improving overall revenue.”

– Trevor Betts, Virtual Tax Solutions

How to pitch your packages

All this sounds good on paper, but putting this into action is another matter.

Some firms opt to present their highest priced option first, underscoring that level's valuable benefits. In turn, the lower tiers are positioned as packages where the client *loses* some of those benefits. In other words, you're saying, "If you purchase the 'good' level, you won't have the benefit of [insert your benefit here]." The idea is that the fear of losing out on these benefits is more powerful than gaining them.

You can pitch your packages visually. Prepare a slide or visual to show clients and prospects the difference between a business where advisory is offered and one without it. Working to ensure your client understands the value of your services—and how they'll see increased revenue and success—helps attract and retain them.



ProConnect Tax Spotlights



What do the Anaheim Ducks, Target, and Intuit® [ProConnect™ Tax](#) all have in common? All three are an integral part of life for Trevor Betts, EA, president of [Virtual Tax Solutions](#) in Lake Elsinore, California. I visited with Trevor to learn more about how he uses ProConnect Tax in his practice and discovered some very interesting fun facts.

Q: [What are a few ways ProConnect Tax benefits your practice?](#)

A: Because ProConnect is web-based instead of desktop-based, it allows me to use live integrations that I never could before with my previous software. Not only that, but being able to load it up in a manner of seconds, without waiting 5-10 minutes for an update to install, is a massive timesaver. The biggest benefit, though, is how it works with [Intuit Tax Advisor](#). One of my major emphases to my clients this season will be that we need to be more proactive; having my tax software work seamlessly with a tax planning tool is a major benefit.

Q: [What are some of the features you like in ProConnect Tax?](#)

A: The **W-2 import** from the payroll provider was a nice feature during extension season. We needed to pull IRS wage and income transcripts for some clients and were able to use the information from that to figure out the state withholding, instead of wasting time on a call to the state or having the client go back and ask their old employer.

The **Review Return window** is something I never knew I needed, but now I probably couldn't live without it. I have a multiple monitor set up and one of them is dedicated to that window, so as I go through and enter the return, I can refresh and see the new data. I'm sure this is also going to be much better this year with the new Checkmark feature.

Data Import is one that I've tested out a little bit and liked a lot, but will be putting it to a real test this year. I've liked it so far, and with my tech stack, it should run smoothly by dragging and dropping the files into ProConnect.

Q: What is unique about your firm compared to other firms?

A: My firm is fully virtual, and leaned hard into that aspect with my firm's name. I haven't carved out any niche's yet, but besides individual returns, I like focusing on S Corporations for the entities I work with.

Q: What is your vision for your firm going forward?

A: My vision is to transition my clients to a forward-thinking model, and have multiple client touchpoints throughout the year with a focus on tax planning and strategizing. The first step will be to overhaul my pricing structure to 3-tiered value pricing, with the end goal that I can provide higher quality service. It may mean that I lose clients, but I believe the model will give me a better work-life balance, while also improving overall revenue. I've already adjusted my questionnaires this year to help me gauge how many clients will be interested in more tax planning.

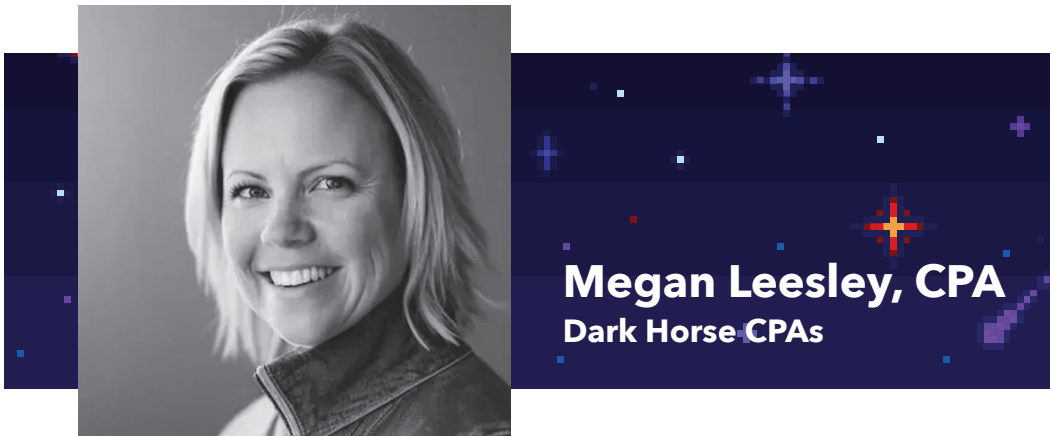
Q: What is your firm's tech stack, and what Intuit products are you using?

A: ProConnect Tax is my tax preparation software, [Sharepoint](#) is for document management, and [Karbon](#) handles practice management. They all integrate with each other in various ways. I also use [QuickBooks Online Accountant](#) for my firm's books. The biggest shoutout in my tech stack that I want to point out is [VXT](#), a VoIP phone system that integrates with Karbon.

An example of how this works would be a client calling about a situation with their upcoming tax return. The call is automatically recorded, and after the call, it is transcribed and gives me an AI summary. I can save this to the Work Item within Karbon with a click of a button. That Work Item was already automatically created from the ProConnect/Karbon integration. Now, three weeks later when I begin working on the tax return, I can quickly review the notes within the Karbon Work Item to refresh my memory.

Q: If you were stranded on a desert island with access to just one kind of technology, what would it be, and why would you want it?

A: A fully charged satellite phone, so I won't be stranded for long.



Meet Megan Leesley, CPA, tax director for [Dark Horse CPAs](#), a national firm that focuses on tax, accounting, and CFO services.

Q: [Where are you based?](#)

A: I'm based out of a small mountain town in Colorado called Salida. However, because Dark Horse is fully remote, I'm able to work from anywhere with a solid internet connection, so I often travel and work from other locations for extended time periods.

Q: [Your practice is structured differently than most practices, right?](#)

A: Correct. We have a unique structure designed to bridge the decision gap CPAs in public accounting face between the traditional partner route—which is often an ambiguous path focused heavily on billable hours rather than actual performance—and the daunting choice to start your own firm from scratch. We strive to provide the tools, structure, and support for our CPAs, while fostering the autonomy and entrepreneurship for each of our principals to build their own practice based on their vision of their ideal client, book of business, and work-life balance.

Q: [So do you consider Dark Horse a disruptor?](#)

A: Absolutely! We are the antithesis of the traditional public accounting firm. Dark Horse has built a flat organization where our "Leadership Team" is not a group of head honchos dictating down the pyramid. Instead, they are a team that serves our CPAs and their staff so they can better serve their clients, directly benefit financially from their work, and set their own goals for work-life balance.

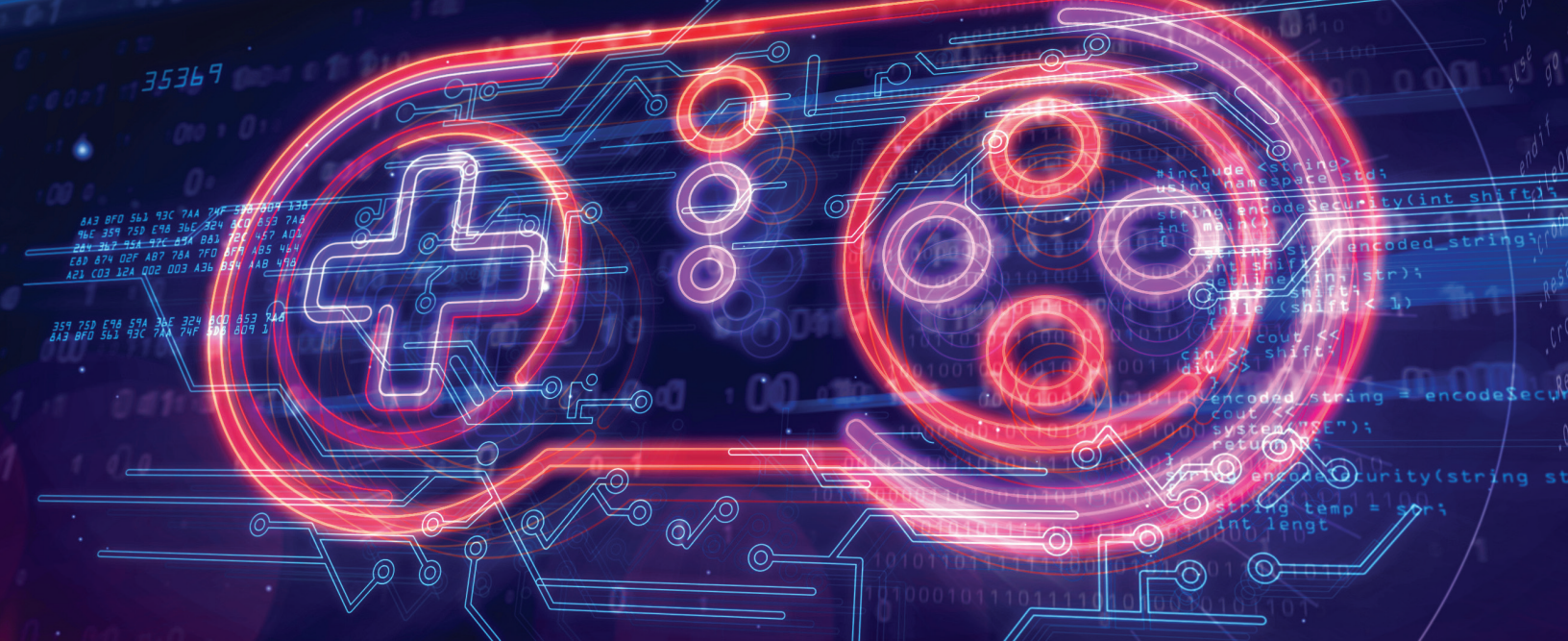
To put it bluntly, Dark Horse is putting the power back in the hands of the CPAs to control their own destinies.

Q: What is your tech stack and what Intuit products are you using?

A: We have an extensive tech stack, but our core technology for Client Advisory Services (CAS) and tax is Intuit-based. On the tax side, we use ProConnect Tax and [Intuit Tax Advisor](#) as our primary tax preparation and planning/[advisory software](#). On the CAS side, we use QuickBooks Online, as do the vast majority of our clients. Our other tech stack offerings, including Karbon, [Ignition](#), and Keeper, were selected not only for their own functionality, but also their integrations with the Intuit products we use.

Q: If you were stranded on a desert island with access to just one kind of technology, what would it be, and why would you want it?

A: The practical side of me wants to say “a satellite phone” so I could tell people my location and be rescued! If rescue was not an option, I’d at least be able to chat with friends and family. As I mentioned before, I’m a bit of an anomaly to the standard image of a CPA in that I’m a complete extrovert and need regular connection time with people, especially my loved ones.



Use technology and automation to your advantage

Technology acts as Mario's mushroom. 🍄

It's the power boost that's necessary to propel you to the next level.

[ProConnect Tax](#) is one of the biggest mushrooms in the game.

This cloud-based professional tax software allows you to create tax returns in minutes, anywhere you want to be. ProConnect Tax streamlines workflows, eliminates manual data entry errors, and saves time by creating efficiencies. As an Intuit product, ProConnect Tax seamlessly integrates with [QuickBooks Online Accountant](#), the go-to software when working with a business owner's books.

One of the newest benefits of ProConnect Tax is Intuit Tax Advisor, an integrated advisory tool that automatically generates strategies for client tax savings. Intuit Tax Advisor is the only tax software that combines QuickBooks Online Accountant and Intuit Tax Advisor for maximum productivity and exceptional results.

"I like how Intuit Tax Advisor syncs. I don't have to do any exporting. It automatically pulls over the numbers from ProConnect Tax, so I can create a really nice-looking tax plan for clients and they can be impressed by it."

– Trevor Betts, Virtual Tax Solutions

Notable features

Much like technology, tax rules can change in an instant. In order to help keep you and your clients in the know, Intuit used client feedback to develop smart features, including the following:

- **IRS transcript direct access:** You can pull all of your client's transcripts directly from the IRS into ProConnect Tax—complete tax returns faster and more accurately with less client back-and-forth tasking.
- **Flags:** Tax preparers can flag missing data, estimates, and fields needing review within ProConnect Tax. Flagged items can be reviewed by clients and accounting professionals in an input drawer, which also houses imported documents, autofills tax document fields, and marks them for review.
- **Customized client letters:** Instead of typing emails manually to notify clients of flags, your firm can send templated letters with preset and customized tax return data fields.
- **1040 import:** Generate a tax summary comparison for the current tax year by creating a new client and using the relevant information from their previous year's Form 1040.
- **Seamless data conversion:** Intuit's Easy Start team of onboarding experts help customers just like you. They'll walk you through the process to ensure your clients' data is converted accurately.

Intuitive tools embedded in ProConnect Tax are among the integrations that save users money, time, and energy:

- **Intuit Link:** Enjoy a cloud-hosted portal that gathers and manages clients' tax documents and data. With [Intuit Link](#), instead of badgering clients for information, you can send them an email link request. Set up automated email reminders every seven days to log into the Link client portal and upload documents.
- **Electronic signature:** Intuit [eSignature](#) provides a quick and convenient way to request signatures. Rather than chasing down clients to sign in ink or using a third-party tool to request signatures, eSignature quickly collects digital client signatures.
- **Protection Plus:** With [Protection Plus](#), receive access to a dedicated team of experts who can handle tax notices and audits.

As a cloud-based professional tax software, ProConnect Tax modernizes your workflows by taking care of tedious, low-value tasks. Whether your firm has one user or 1,000, custom pricing options cover all firms with tax return bundles of every size. The next level of your firm's success is waiting—press "START" today. Call **844-818-5406** today to schedule a free consultation.

Conclusion

As a high-performing tax professional, there's a natural inclination to move beyond tax prep and compliance. One of the best ways to level up—and increase revenue and job satisfaction—is by scaling advisory services for your tax and accounting clients. How you do that comes down to several key factors, including retaining your clients and finding new ones, enhancing the client experience, ensuring client relationships are valuable, pricing your services for success, and using technology to your advantage.

By tailoring your expanded services not only to your clients, but also your unique firm, you can progress to the next level. And while you might make mistakes and learn from them along the way, it's never "Game Over" like it is in Super Mario Bros. Instead, those lessons make you and your firm stronger. To quote Mario, himself: "Wahoo!" 🌟

