

Intuit ProConnect Expands Partnership Ecosystem to Accelerate Software Capabilities for Tax Professionals

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Integrations with trusted partners allow tax professionals and their clients to grow and prosper

Intuit ProConnect is announcing plans to expand the capabilities in ProConnect Tax Online, Lacerte and ProSeries with new third-party integrations. The expanding partnership ecosystem will give tax professionals access to new tools to deliver on client needs, help automate compliance work and keep the software they know and love, with the added benefit of an enhanced workflow.

"We believe that meaningful relationships are at the heart of every interaction between clients and tax professionals, and reducing the compliance work will free up time so that professionals can focus more of their time giving valuable advice to their clients, helping them reach their goals," said Barry Pennett, Intuit ProConnect General Manager.

Enhanced and expanded capabilities for tax year 2019 include:

Hosting for ProSeries and Lacerte

- Powered by Right Networks, tax professionals now have the ability to access their work anytime, anywhere through a server-free, maintenance-reduced model with built-in data protections and automated nightly backup.
- Multi-user access allows firms of all sizes to simplify staff collaboration across multiple sites giving employees the option to work remotely without missing a beat, and to accommodate seasonal workers as needed with flexible billing options.
- Cloud hosting also means tax professionals can have a more flexible and secure storage options for tax data in their current workflow.

Expanded Intuit eSignature Capabilities

- Powered by DocuSign, tax professionals have a better way to collect and submit signatures for all forms including business forms, engagement letters, invoices, non-disclosure agreements, and bank documents so firms don't have to worry about having two separate signing processes.
- The new automated eSignature dashboard saves tax professionals with the ability to collect signatures for all client documents and forms.

Improved Pay-by-Refund Enrollment and Signature Pad Integration

- Intuit is enhancing how clients pay for their tax prep with improved bank enrollment experience and more bank partner choices integrated within ProConnect Tax Online, Lacerte and ProSeries or available online anytime within MyAccount.
- New signature pad integration in ProSeries Professional allows in-person signatures to be captured in a paperless process reducing printing costs and improving preparer efficiency.

With new, impactful workflow integrations and accelerated capabilities, Intuit is also maintaining the security of Intuit products as a top priority, continuing to invest and ensure our platform and integrations have industry-leading fraud protection. As part of its ongoing commitment to protect customer information, Intuit has implemented multiple security measures in its professional tax products, including multi-factor authentication, an additional level of data encryption to help further protect data and in-product security tips.

"We are very excited about the new capabilities we will deliver to our customers as we work jointly with strategic partners to better serve the needs of the tax and accounting firm," said Jorge Olavarrieta, Intuit ProConnect Vice President of Product Management. "We are enabling deeper integrations at the most critical points of the professional's workflow to create a platform that allows them to more effectively manage their work and provides them with richer insights that enables them and their clients to grow and prosper."

Integrations with trusted partners helps automate compliance work by working with your existing core tax

software, freeing up more time for firms and tax professionals to deliver advisory services to clients. Intuit knows availability to tools that deliver on client needs is paramount to the productivity of firms, and with these new advanced capabilities, Intuit is working to increase functionality in the professional tax software, including ProConnect Tax Online, Lacerte and ProSeries. To learn more visit proconnect.intuit.com/accelerating-capabilities/.

About Intuit

Intuit's mission is to Power Prosperity Around the World. Our global products and platforms, including TurboTax, QuickBooks, Mint and Turbo, are designed to empower consumers, self-employed and small businesses to improve their financial lives, finding them more money with the least amount of work, while giving them complete confidence in their actions and decisions. Our innovative ecosystem of financial management solutions serves approximately 50 million customers worldwide, unleashing the power of many for the prosperity of one. Please visit us for the latest news and in-depth information about Intuit and its brands and find us on social.

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