

# NAVIGATING AI ADVANCEMENTS

Trends, Challenges, and Strategies  
for Business Leaders

*Distributed by:*  
*United Wealth Solutions*

# AI Tax Workflow – Executive Summary

**Why This Matters** AI-powered tax workflow tools dramatically reduce prep time, improve accuracy, and streamline intake, review, and delivery. Firms adopting these tools now are getting significantly more work out the door this tax season.

## Top Recommendations for This Season

- **StanfordTax / Soraban** – Best-in-class AI intake automation (biggest time-saver).
- **Juno** – Strongest AI review tool for catching missing docs & discrepancies.
- **Magnetic** – Most advanced AI data extraction & input automation (beats OCR).
- **Filed** – Reliable extraction + early-stage workpaper prep.
- **SafeSend** – Best automated delivery for client-facing processes.
- **BlueJ** – Leading AI research + future compliance validation engine.
- **Truss** – Up-and-coming all-in-one intake + delivery option.

## Risks / Tools to Avoid (for now)

- **TaxCaddy** – Outdated, slow innovation.
- **1040Scan / SurePrep** – OCR-based tech falling behind AI vision.
- **GruntWorx** – No meaningful AI adoption.

## Key Opportunities

- Intake automation saves more hours than any other workflow stage.
- AI review tools improve automatically as AI models advance.
- Input tools can eliminate manual data entry for W-2s, 1099s, brokerage statements, etc.
- Delivery automation reduces client confusion and cuts follow-up emails.

## Recommended Partner Strategy

1. Adopt AI intake immediately (StanfordTax or Soraban).
2. Layer in AI review (Juno or TaxGPT).
3. Use Magnetic or Filed for data extraction to reduce manual entry.
4. Deliver all returns using SafeSend or Soraban Deliver.
5. Use BlueJ or ChatGPT for research & reasoning.

## Expected Impact

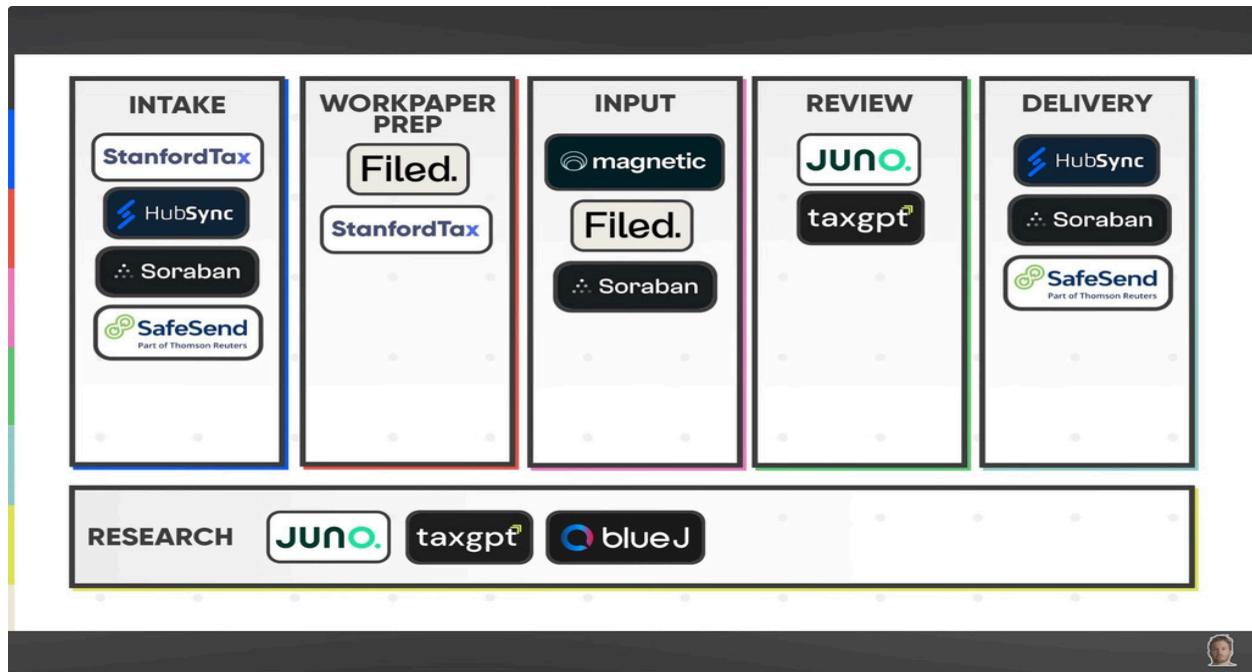
- 25–40% faster tax preparation.
- Fewer review cycles & fewer missing documents.
- More capacity without hiring additional staff.

## Executive Summary

AI-powered tax workflow tools have become essential for modern firms aiming to increase efficiency, accuracy, and production during tax season. These tools automate intake, extraction, review, delivery, and research—allowing firms to process more returns with fewer bottlenecks. The following report provides an in-depth breakdown of major tools, their workflow stages, strengths, and strategic recommendations for the 2025 season.

- AI intake automation (StanfordTax, Soraban) remains the #1 time-saver.
- Magnetic and Filed improve extraction accuracy far beyond legacy OCR.
- Juno and TaxGPT provide AI review, acting as second-level checkers.
- SafeSend is still the strongest for automated return delivery.
- Tools like TaxCaddy, 1040Scan, and GruntWorx are outdated and should be avoided.
- BlueJ and Truss are emerging high-potential platforms worth monitoring.

# AI-Enhanced Tax Workflow Map (2025 Season)



## Detailed Tool Analysis

### **StanfordTax**

Leading intake automation platform. Pulls prior-year data, generates smart checklists, detects missing documents, and auto-builds digital workpapers.

### **Soraban**

Strong in intake, extraction, and delivery. The Collect module is highly rated for accuracy in document reconciliation.

### **Magnetic**

A Y Combinator-backed extraction tool using AI vision (not OCR). Extremely accurate, even with handwritten forms.

### **Filed**

Extraction tool with logic-based decision support and early-stage workpaper functionality.

### **Juno**

Top AI review engine. Compares tax returns to source documents and flags inconsistencies.

### **TaxGPT**

AI research + review hybrid. Uses agents to detect issues and answer tax reasoning questions.

### **HubSync**

Unified intake + delivery portal. Early features but promising growth.

### **SafeSend**

The industry standard for automated delivery. Best client-facing experience.

### **BlueJ**

AI reasoning + research tool with major investment backing. Expected to expand into workflow validation.

### **Truss**

New all-in-one workflow platform with intake and delivery tools gaining strong user feedback.

## Tools to Avoid / Approach Carefully

### **TaxCaddy**

Outdated intake platform with slow innovation.

### **1040Scan**

OCR-based system that performs worse than AI extraction tools.

### **GruntWorx**

OCR-era extraction with no meaningful AI adoption.

# United Wealth AI Tool Evaluation Chart 2025 – Option A

Tool		Strengths	Recommendation
StanfordTax	Stage	Best checklisting + workflow automation	Highly Recommended
Soraban	Intake/ Delivery	Full-suite platform; strong intake performance	Highly Recommended
Magnetic	Input	Most accurate AI extraction	Highly Recommended
Filed / Juno	Input / Workpaper	Extraction + logic assistance	Highly Recommended
TaxGPT	Review / Research	AI review + tax reasoning	Highly Recommended
SafeSend	Delivery	Best client experience	Recommended
HubSync	Intake / Delivery	Unified portal; improving	Recommended Watch
BlueJ / Truss	Research	\$122M funding; high potential	Recommended Watch
TaxCaddy	Intake / Delivery	High-rated new entrant	Avoid
1040Scan	Intake	Legacy tech	Avoid
GruntWorx	Input	OCR-based	Avoid
GrowFlow	Input	No AI adoption	Avoid

## Key Takeaways & Strategy for 2025

- Intake automation produces the greatest time savings.
- AI extraction drastically reduces manual entry and errors.
- AI review tools reduce second-review workloads.
- Delivery automation improves client communication and reduces mistakes.
- Research tools are becoming more AI-powered and will grow in importance.

### **Recommended Implementation Order:**

1. Choose an intake system (StanfordTax or Soraban).
2. Add extraction automation (Magnetic, Filed).
3. Implement AI review (Juno, TaxGPT).
4. Standardize delivery with SafeSend.
5. Add BlueJ for research as needed.