

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- **TaxCaddy** – Outdated, slow innovation.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

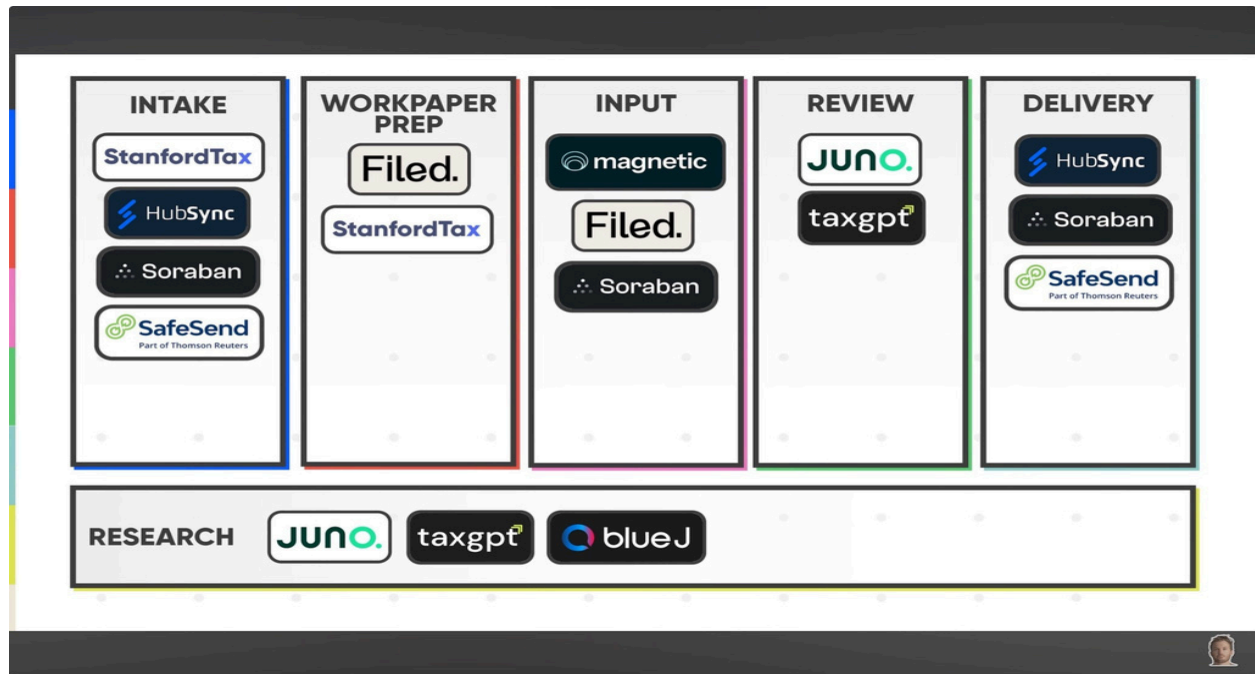
- 25–40% faster tax preparation.
- Fewer review cycles & fewer missing documents.
- More capacity without hiring additional staff.

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.