

AI DATA ENTRY AGENT

Where Tax Prep Just Moves Client Documents In. *Return Ready.*

Manual data entry eats time and profits. Your staff is retyping forms field by field, reviews pile up, and growth outpaces hiring.



What if AI handled the
data entry for you?
No outsourcing.
No bottlenecks.

HOW IT WORKS



3. PUSH

Exports directly into your tax software



2. REVIEW

Auto-checks name, SSN, tax year accuracy



1. EXTRACT

AI reads docs and pulls data in under an hour

TAX SOFTWARES:

UltraTax

CCH Axcess

Lacerte

Drake

AI THAT GETS IT RIGHT

“We stopped reviewing every 1040 line by hand. Connect just works – and we actually trust it.”

BOTTOM-LINE IMPACT

10–20h

Saved per preparer, per month

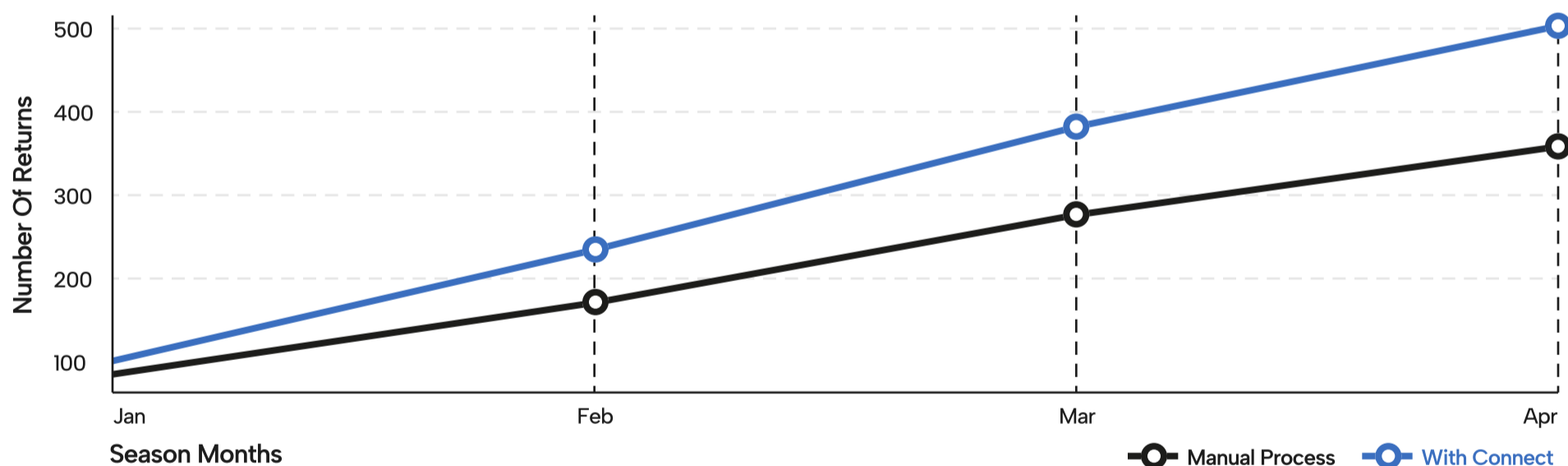
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Hiring delays and errors

0

Process changes required

PRODUCTIVITY GROWTH: RETURNS PROCESSED PER SEASON



Ready To Ditch
Data Entry **For Good?**

