

# Taxpayer Insights 2024

## A Guide For Tax Professionals



### Overview

Intuit surveyed over 3,000 US taxpayers who use a tax professional to file their taxes. The goal was to provide a comprehensive view of taxpayers and their experience when working with a tax professional and gain insights into their expectations of services they would like offered.

# Table of Contents

[Tax Advisory](#)

[Electronic Signature](#)

[Security](#)

[Pay-by-Refund](#)

[Audit Protection](#)

[Staffing](#)

[Behavioral Habits](#)

By leveraging these insights, you can:



Identify opportunities to enhance your firm's business model



Grow your client base by offering new and valuable services



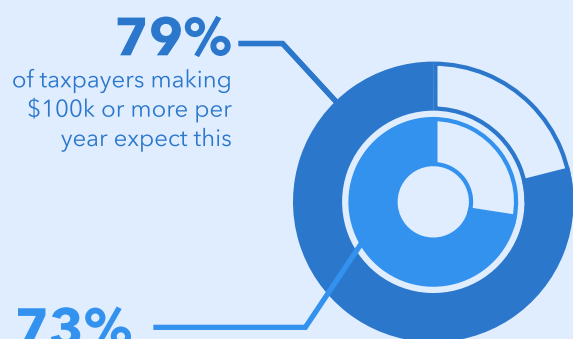
Ensure that you are meeting the needs of your clients and increasing client satisfaction and loyalty

## Tax Advisory

### Taxpayers want to work with Tax Pros who offer tax advice and strategies

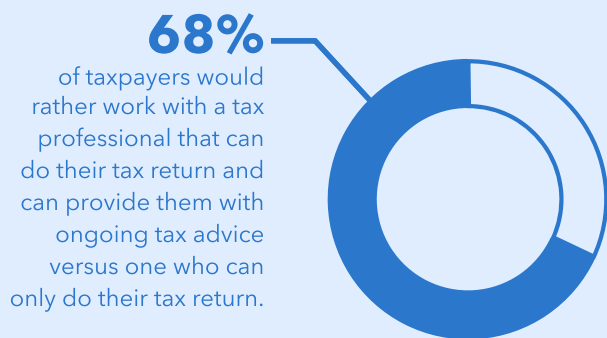


**70%** of taxpayers expect financial and tax advice from their tax professional.



**79%**  
of taxpayers making \$100k or more per year expect this

**73%**  
of taxpayers expect their tax professional to provide them with tax strategies that will result in improved financial outcomes.



**68%**  
of taxpayers would rather work with a tax professional that can do their tax return and can provide them with ongoing tax advice versus one who can only do their tax return.

### Taxpayers want their tax strategies to be easy to follow



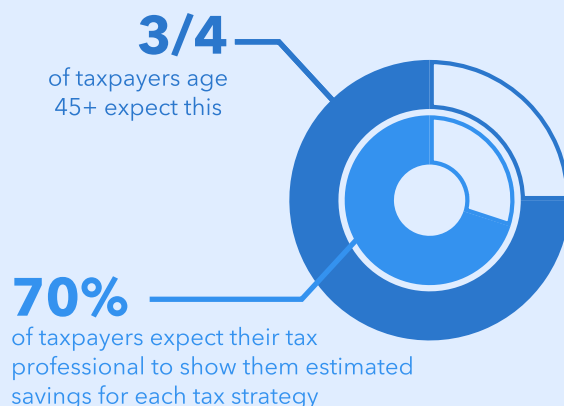
**70%**  
of taxpayers expect to see their tax saving strategies in an easily digestible format that shows the tax strategies and potential savings.

### Taxpayers will pay more for improved financial outcomes

## Over 60%

of taxpayers are willing to pay more for a tax professional's service if it might result in improved financial outcomes. (e.g. reducing tax liability, money savings, etc.)

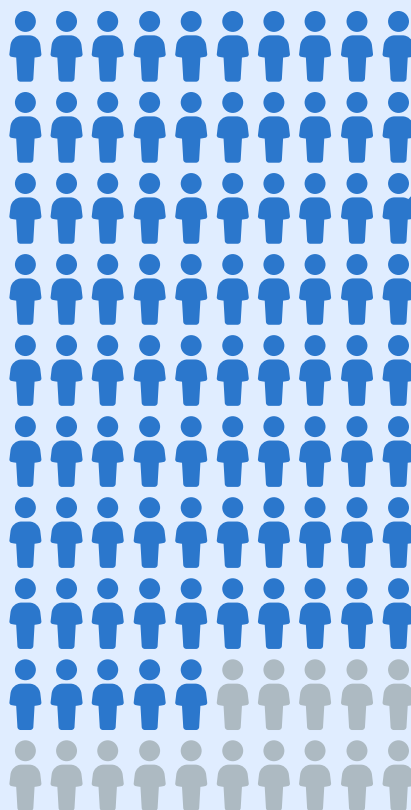
### Taxpayers want to see the estimated savings for a tax strategy



**3/4**  
of taxpayers age 45+ expect this

**70%**  
of taxpayers expect their tax professional to show them estimated savings for each tax strategy

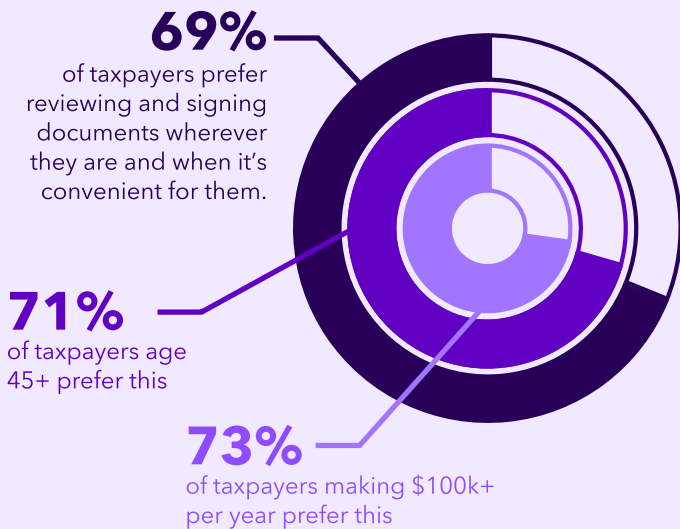
### Taxpayers want their tax professional to know the tax laws and strategies



**85%**  
of taxpayers expect their tax professional to be up to date on the latest tax laws and strategies.

## Electronic Signature

### Taxpayers like the convenience of electronic signatures



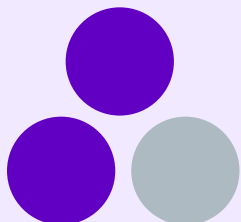
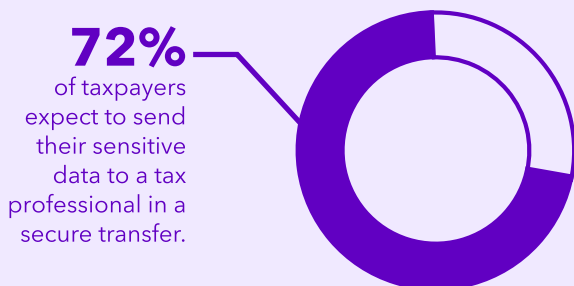
### How do taxpayers feel about signing their documents electronically?

**7 out of 10**

taxpayers age 45+ believe electronically signing is safe and secure



### Why tax professionals should offer electronic signatures



**2 out of 3**

taxpayers expect their tax professional to give them the option of signing their documents remotely.

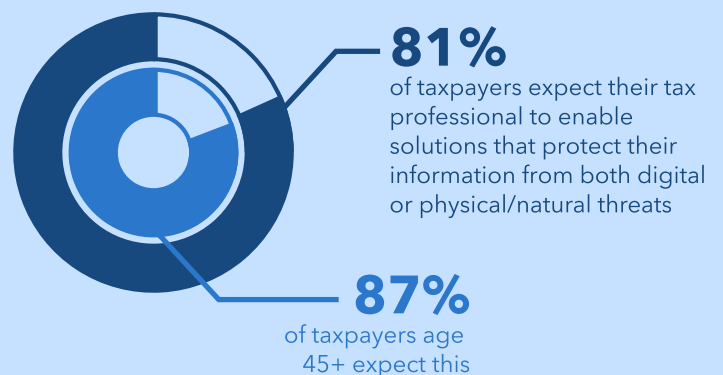
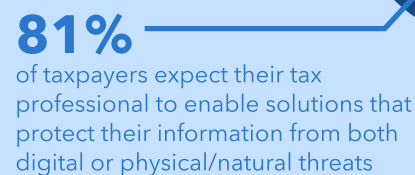
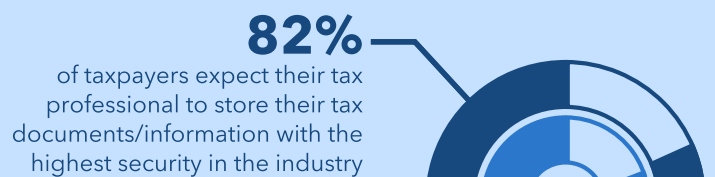
## Connected World

### How Taxpayers work with their Tax Pro is changing

The total number of internet users around the world continues to grow. It's now a world where taxpayers have the ability to work with their Tax Pro from anywhere, any time on any connected device. This has led to wide-spread confidence in, and the proliferation of, highly secure digital products and services that help Tax Pros manage client data resulting in successful financial outcomes. It also enables firms to hire and retain the best talent remotely.

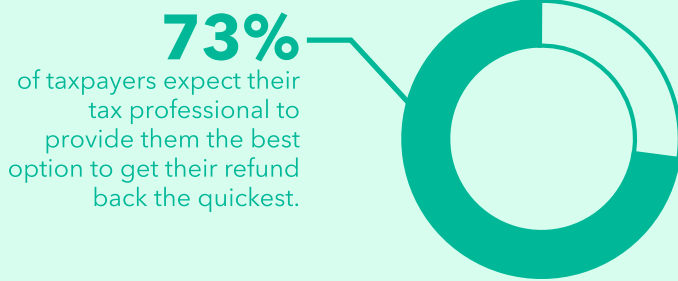
## Security

### The importance to taxpayers on protecting their information



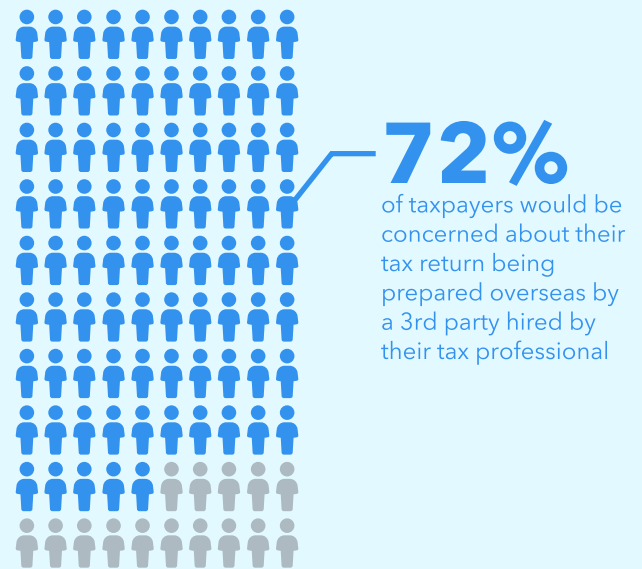
## Pay-by-Refund

### Taxpayer expectations regarding their refund



## Staffing

### How do taxpayers feel about staffing



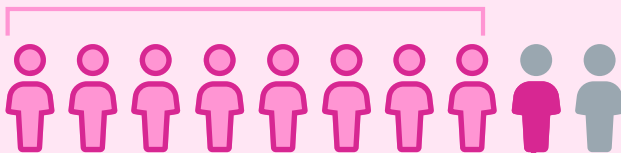
## Audit Protection

### How taxpayers view the potential of being audited



### 8 out of 10

taxpayers want to have peace of mind knowing they will have help in the event of a tax notice or audit.

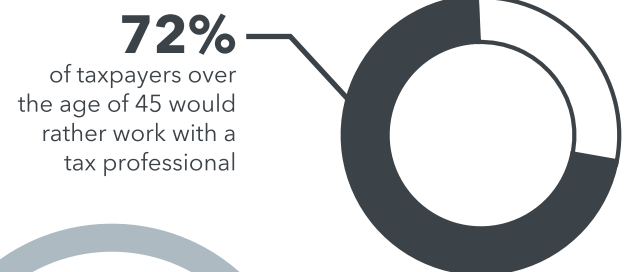


**88%** of taxpayers age 45+ want this



## Behavioral Habits

### Important taxpayer behaviors



**81%**  
of taxpayers pay their bills and/or purchase things online

### Taxpayer Demographics

The use of a Tax Pro is the common thread among our

**3,000 participants**

Otherwise, those surveyed spanned all age groups, genders, races, and locations across the United States.

