

AI in Tax Practice: Automating Workflows, Research, and IRS Compliance

Credits 3.0	Field of Study Taxes	Course Category Tax	Level Intermediate
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COURSE DESCRIPTION

The tax profession is moving away from manual data entry and toward a model where practitioners act as AI-augmented advisors. This course examines how tax professionals can use artificial intelligence to manage the full tax lifecycle more effectively. It begins with a look at the current state of tax technology, then moves into practical applications for tax research and data extraction for Form 1040 and 1120 preparation. The session covers how firms can use AI to draft responses to IRS notices and prepare for audits with greater precision. It also addresses the increasing use of AI by the IRS for enforcement and selection, providing practitioners with the insights needed to protect their clients in an increasingly digital regulatory environment.

LEARNING OBJECTIVES

- Identify specific AI tools and techniques that automate the extraction of data from client source documents for tax return preparation.
- Apply AI-driven research methods to resolve complex tax law questions and document technical positions.
- Develop strategies to use artificial intelligence for drafting responses to IRS notices and managing audit inquiries.
- Assess the impact of IRS digital enforcement trends and AI-based audit selection on client representation strategies.

MAJOR TOPICS

- The evolution of the tax lifecycle in the age of generative AI
- Automating data ingestion for individual and corporate tax returns
- Advanced AI research techniques for federal and state tax law
- Drafting IRS correspondence and audit defense documentation with AI
- IRS enforcement trends: How the Service uses AI for audit selection
- Ethical considerations and data privacy in a digital tax practice

WHAT YOU'LL WALK AWAY WITH

- You'll stop manually extracting data from client source documents for your 1040 and 1120 filings.
- You'll use AI-driven research methods to find answers to complex federal and state tax law questions.
- You'll draft precise, professional responses to IRS notices in a fraction of the time it takes now.
- You'll prepare audit defense documentation that directly addresses the IRS's own digital enforcement logic.
- You'll adjust your client representation strategies to account for the Service's new AI-based audit selection trends.

QUESTIONS

What level of tax experience do I need for this course?

This is an intermediate course designed for professionals who already have a foundational knowledge of federal tax law and standard preparation procedures. It's built for those who currently handle research, preparation, or IRS controversy work.

Will this course teach me how to use specific tax preparation software?

No, this session focuses on the application of artificial intelligence tools across the tax lifecycle rather than training on a specific brand of prep software. You should already be comfortable using professional tax software before you begin.

Does the material cover corporate tax returns or just individual filings?

The course covers both. We look at practical AI applications for data extraction and preparation for Form 1040 and Form 1120, making it relevant for both individual and business practitioners.

Is there a focus on IRS audits and enforcement?

Yes. A significant portion of the course is dedicated to how the IRS uses AI for audit selection and how you can use the same technology to draft better responses to notices.

Do I need to be an AI expert to follow along?

You don't need to be a programmer. We recommend a basic understanding of generative AI tools, but we focus on the practical workflow changes that matter to accountants and tax partners.

A NOTE FROM THE AUTHOR

I remember the first time I realized that my value as a tax professional wasn't in my ability to type numbers into a form, but in how I interpreted the law for my clients. I wrote this course because the tools we use are changing faster than our workflows, and we need a clear roadmap to keep up. I want to show you how to move from being a data processor to an AI-augmented advisor who focuses on high-level strategy.

ADDITIONAL INFORMATION

- **Who Should Attend:** Tax partners, managers, and staff accountants who handle tax research, preparation, and IRS controversy work for individuals and business entities.
- **Prerequisites:** A foundational knowledge of federal tax law and standard tax preparation procedures.
- **Advanced Preparation:** Experience with professional tax preparation software and a basic understanding of generative AI tools is recommended.
- **Tags:** accounting ai, ai bookkeeping, data analysis tools, tax automation software, IRS compliance
- **Course ID:** 2211
- **Short Name:** Tax AI Workflows

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