



INSIDE THE TAX LEADER CIRCLE TRENDS

A Look Inside the Tax Leader Circle

This resource offers a behind-the-scenes look at how members of the Boomer Tax Leader Circle work through real challenges together. It captures how Tax leaders are navigating a shift in the profession, evolving their tax practice from a compliance-driven, busy-season model to a year-round advisory engine.

The moment that triggers the conversation

Does any of this sound familiar?

“We’re good at tax. But we’re still running the same busy season model we built 20 years ago. Something has to change.”

“I have 80 to 90 people in the tax department, and we push everything through the same April bottleneck. It doesn’t have to be this way.”

“Our clients want advice year-round. We’re structured to deliver a tax return once a year. Those two things don’t add up.”

“AI is coming for the compliance work. If we don’t figure out what’s on the other side of that and what to do with the capacity it creates, we’re going to have a real problem.”

These are the conversations tax leaders brought to the table at a recent Boomer Tax Leader Circle meeting. Members came in with different firm sizes, different tech stacks and different timelines. But they asked the same underlying questions: What does a healthy, sustainable tax practice actually look like? And how do we build it? Nobody had all the answers. But the group used each other’s experience to think about the problem more clearly. They walked away with sharper thinking and concrete next steps.

TO JOIN & FURTHER INFORMATION:

boomer.com/tlc

What's changing: Trends Circle members are reacting to

Tax leaders in the Boomer Circles work at the intersection of firm strategy, talent pressure and rapid technology change. They see the signals before they become firm-wide problems.

AI is compressing the compliance economics faster than firms are ready for

Benchmarks from Thomson Reuters, Wolters Kluwer, and the AICPA show AI delivering 25–35% faster 1040 prep, 50–70% less document-processing time, and tax research up to 4X faster. The real question is whether firms are positioned to benefit from these gains—or be disrupted by them.

Busy season is a design choice, but most firms are still treating it like a law of nature

Leading firms ask whether the April compression is inevitable or self-imposed. Strategies emerging across the profession include proactive extensions, tiered pricing that creates incentives for earlier delivery, year-end tax planning that front-loads the work and client filtering that sheds low-value volume to make room for higher-value year-round relationships.

Clients want advisory. Firms are still selling compliance.

The gap between what clients say they value (proactive strategy, year-round access, insight from their data) and what firms deliver (a tax return, once a year) is widening. AI-powered tools create the capacity to close that gap. But the firm has to be structured, staffed and priced to deliver on it.

Pricing and billing are disciplines, and the profession hasn't treated them that way

Traditional hourly billing is incompatible with AI-driven efficiency gains. Firms that fail to shift toward value-based pricing risk shrinking revenue as hours decline, while leading firms are standardizing pricing and tightening billing oversight to protect margins.

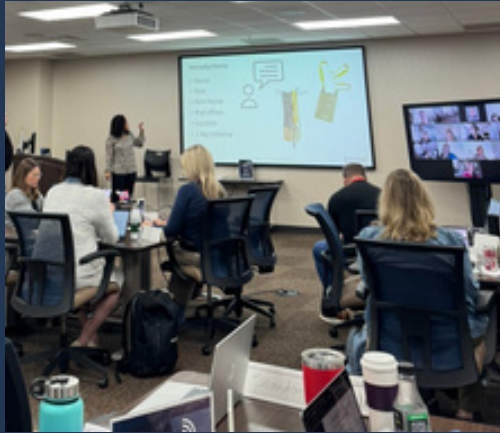
Shifts redefining tax strategy in accounting firms

Circle members don't rush to solutions. They pressure test assumptions by asking questions like:

- If AI handles more preparation work, how do we redefine and develop staff roles?
- Do clients see us as trusted advisors or primarily tax preparers?
- Where does the client experience reinforce our value, and where does it create friction?
- Are we building a sustainable year-round advisory model or extending busy season into another spike?
- What would improve if we stopped serving certain low-value clients?

These questions help firms uncover the gap between current reality and future strategy so decisions become intentional, not reactive.





Why this works better in a peer community

Tax leaders can find industry research anywhere. What they can't replicate is the peer pressure test.

Inside a Circle community, members challenge assumptions, share what's actually working, and learn from firms facing similar operational realities. The conversations go beyond theory to uncover the operational, staffing, and client-service implications behind strategic decisions. They leave with practical next steps, trusted peer relationships, and accountability that extends beyond the meeting itself.



What strong tax leaders do differently

Firms making real progress in the compliance-to-advisory shift share a few common traits:

1. **They treat AI as a leadership strategy, not a tech project.** Leaders drive adoption through clear use cases, accountability, and an AI-first mindset.
2. **They assign ownership.** Strong firms clearly define who owns pricing, billing, and client filtering and empower them to enforce standards.
3. **They focus on the capacity AI creates.** Instead of simply reducing hours, they reinvest time into advisory services, proactive planning, and staff development.
4. **They actively manage client fit.** Leading firms define ideal clients, enforce minimum fees, and intentionally replace low-value work with higher-value relationships.
5. **They develop advisory-ready talent early.** Junior staff are brought into client communication, meetings, and leadership opportunities sooner to build the skills firms will need next.

See how the conversation unfolds

This is how the Boomer Tax Leader Circle works. Members don't just receive templates and frameworks. They take part in conversations with peers who run firms at a similar scale, face the same challenges and ask the same hard questions. These conversations help them make better decisions, faster.

[Join us in the Tax Leader Circle.](#)

TO JOIN & FURTHER INFORMATION:

boomer.com/tlc