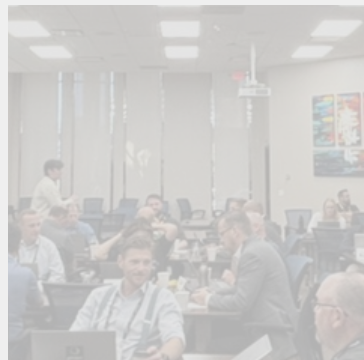
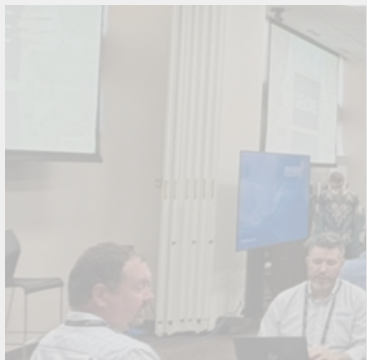


2026

Highlights from the

Boomer Tax Leader Circle

Essential insights and takeaways from the latest Circle meeting that help your firm stay aligned, informed, and prepared for what comes next.



Highlights from the Boomer Tax Leader Circle™ 2026 Spring Meeting

The Boomer Tax Leader Circle™ is a community of the accounting profession's top tax leaders within CPA firms. These leaders gather to collaborate and share leading-edge strategies in practice modernization and firm-wide alignment. Learn more at www.boomer.com/tlc.

In April of 2026, Boomer Tax Leader Circle™ members met in Kansas City, Missouri, for our first meeting. Members shared knowledge, discussed what the future holds for public accounting firms and began building relationships with peers. The discussions centered around the following topics:

- **Trends for 2026**
 - Staying ahead of trends requires awareness and the ability to translate those trends into firm strategy.
 - In this session, we discussed macro trends redefining the profession in 2026, including the rise of AI-first culture and redesigning operating models for scale. Members had time for a Q&A and discussion on implications for their firms.
- **AI and Technology Are Reshaping the Tax Practice**
 - AI is compressing the time it takes to do compliance work, which changes the economics of tax. Firms that don't pair efficiency gains with a deliberate shift in pricing and service mix risk shrinking their own revenue while working faster.
 - In this session, we explored where AI is showing up in tax workflows today, from return prep and document ingestion to tax research and advisory. We also discussed what it means for the tax business model.
- **Charting the Course for the Tax Leader Circle**
 - A peer community only delivers lasting value when members are aligned on what it's for, what it's not and what they expect from each other. That shared clarity separates a group that meets from a community that drives real change.
 - In this session, we established the purpose and direction of the Tax Leader Circle, emphasizing that the community exists to help growth-minded tax leaders stop surviving disruption and start leading through it.
- **Breaking the Busy Season Model**
 - The profession tends to treat busy season as an unavoidable feature of tax practice. But for many firms, it's a design problem rather than a professional requirement.
 - In this session, we explored how firms can move away from the traditional busy season model through process redesign and deliberate change leadership.

- **Leveraging AI and Technology in the Tax Practice**
 - Tax leaders are adopting AI tools at different speeds and in different ways, and the most valuable learning often comes from hearing specifically what is working at peer firms, not from vendor pitches or conference sessions.
 - A conversation came up during our Ask Your Peers session where firms shared real examples of how they use AI in daily tax work. The conversation brought up a tension in many firms: IT blocking AI tools out of data security concerns, while staff find workarounds on personal devices.

- **Sponsor Highlights**
 - Evaluating the right technology partners is one of the most consequential decisions a tax leader makes. The wrong tools slow teams down, while the right ones unlock capacity, improve client experience and accelerate the shift to advisory services.
 - Members heard from thought leaders at Basis and Wolters Kluwer on how their solutions address the profession's most pressing challenges. Both sessions included open Q&A, allowing members to explore how these solutions address current challenges in their own firms.

- **Developing Team Members to Be More Proactive and Client-Facing**
 - Moving from compliance to advisory requires intentionally developing team members at every level, helping them build the confidence and skills to lead client conversations.
 - During our Ask Your Peers session, members exchanged practical approaches for getting tax staff client-ready earlier in their careers, including bringing associates into client meetings alongside managers, BCCing junior staff on partner emails so they can observe client communication, and building internal review teams staffed by associates to evaluate new prospects against ideal client criteria.

- **Take it Back Sharing**
 - We never want our members to leave a high-value meeting with good intentions and no plan.
 - Members closed the meeting with structured individual reflection using the Take It Back tool, identifying three to five specific commitments to bring back to their firms, each tied to key stakeholders, a clear rationale, and a due date. Rather than compiling a laundry list of everything discussed over the two days, members were guided to focus on the initiatives most likely to move the needle, then broke into small groups to share their commitments with peers.

As always, it's impossible to cover every detail of our great discussions and brainstorming sessions in this short, high-level summary. However, the topics mentioned

in this report should give you some great insight into the challenges and solutions that the profession's tax leaders are thinking about today.

An Invitation to Participate in the Boomer Tax Leader Circle™

To learn more about the Boomer Tax Leader Circle community, please visit www.boomer.com/tlc.

About Boomer Consulting, Inc.

Boomer Consulting, Inc. provides consulting services to hundreds of the highest performing CPA firms. Our unique and powerful solutions target five areas critical to a firm's success: Leadership, Talent, Growth, Technology and Processes. For more information, visit www.boomer.com