

Automate Tax Preparation with an AI ProSeries Agent on AWS

Why Modernise Tax Preparation?

Tax firms today are expected to turn returns around fast, from a client who sends statements by email one at a time, while every W-2, 1099 and 1098 box is still keyed by hand into the preparer's software. Practices that rely on this manual setup face slow turnaround, transcription errors found only at review, and hours of skilled time lost to data entry.

By modernising preparation with an AI-native platform on AWS, AmeriTax clients upload their documents to a guided checklist, answer the few questions no document can, and the return arrives in Intuit ProSeries typed, checked and evidenced — ready for the CPA's review.



Benefits

- **Hours, Not Days —**
  Upload the documents and the AI reader extracts every box, the CPA approves, and the robot types the return into ProSeries with no re-keying.
- **One Source of Truth —**
  Documents, extracted boxes, client answers, runs and evidence are kept in a single PostgreSQL model, auditable from the printed 1040 back to the page.
- **Reviewed, Corrected and Yours —**
  Every value sits beside its source crop with a confidence; approve, correct or send a document back to the client before anything is typed.
- **Secure by Design —**
  Verified sign-in, per-client data isolation and encrypted identity documents ensure each client's return is seen only by their own CPA.

The comprehensive path to AI-native tax preparation

Amazon Web Services provides AmeriTax with a secure, scalable and fully managed cloud foundation to run the portal, the document reader and the ProSeries robot together — avoiding the complexity of maintaining AI infrastructure while benefiting from enterprise-grade security and managed data services.

Combined with large language and vision models behind a provider-agnostic layer, Amazon RDS for PostgreSQL, Amazon S3 and Amazon EC2, AmeriTax delivers a best-of-breed AI tax-preparation stack.



Comprehensive AI Capabilities for Tax Preparers

- **AI Document Reader –**
  Reads W-2, 1099-INT/DIV/B/R/NEC, SSA-1099, 1098, 1098-T, 1095-A and K-1 forms box by box, checking each against the client's identity and the tax year being prepared.
- **Client Portal and Checklist –**
  Derives each client's required documents from last year's return and their answers, with verified sign-in and uploads.
- **ProSeries Robot –**
  A screen-reading agent opens every worksheet, places each value by vision, types it, and keeps a screenshot per field.
- **Worksheet Rules and Run Report –**
  Form 8867, Schedule B, identity and e-file worksheets answered from facts with reasons; a live report compares to last year's.

Resources

AWS Services Powering AmeriTax

- **Amazon EC2:** https://aws.amazon.com/ec2/
- **Amazon RDS for PostgreSQL:** https://aws.amazon.com/rds/postgresql/
- **Amazon S3:** https://aws.amazon.com/s3/

AmeriTax AI Tax Platform

An AI-native tax-preparation platform that turns a client's documents into a typed, checked ProSeries return — a guided client checklist, an AI document reader, a CPA review workspace and a screen-reading ProSeries robot, with evidence for every field, built for CPA firms on AWS.

Forms supported: W-2, 1099-INT/DIV/B/R/NEC, SSA-1099, 1098, 1098-T, 1095-A, K-1 and prior-year 1040 etc.

https://ameritax.us/

SST
Together we can make it possible

AWS Partner Promotion

Shri Sai Tech's AI Tax Preparation Solution on AWS helps CPA firms take a return from a client's documents to a typed, evidenced ProSeries return — without manual data entry, on a secure, scalable AWS cloud platform.

Built on large language and vision models, Amazon RDS for PostgreSQL and Amazon S3, the AmeriTax platform reads each document, validates it against the client, and types every box into ProSeries with a screenshot as evidence — with a live run report and a line-by-line comparison to last year.

By capturing every document, box and answer in one relational model, AmeriTax replaces email threads and re-keying with a single source of truth — preparers review, correct and approve AI-read values before anything is typed.

Tax teams benefit from hours-not-days preparation, per-client security with verified sign-in, worksheet questions answered with a reason, and a platform that scales — without requiring any technical expertise to maintain.

Call to Action

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