

WINDING RIVER CONSULTING

CPA LEADERSHIP INSTITUTE | LEADERSHIP CONFERENCE |
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AI & the Talent Model:

Redesigning the Ladder

Dr. Rachel Anevski

MAOB, PHR, SHRM-CP

Managing Director, People & Leadership
Winding River Consulting

ranevski@windingriverconsulting.com

ABOUT YOUR
FACILITATOR

Dr. Rachel Anevski

MAOB, PHR, SHRM-CP

25+ years in HR strategy & leadership development

Former HR/MKT/BD Director - Public Accounting

Doctoral research: succession development in U.S. public accounting firms (2025)

Co-author: Accounting for Times * Evolve of Dissolve (2023) _ Dr. Jessica Levin

Creator: Train Your Successor™ Framework

Creator: Build Your Network, Build Your Brand Framework

Speaker: AICPA, FIRM GROWTH FORUM, CPAFMA, AAM & regional conferences

Research Focus

**Succession
Development
in Public Accounting**

Framework

**Train Your Successor™
5-Pillar Model**

Lived Experience

**Former HR Director
Public Accounting
Firms**

Today's Context

**AI & Talent Strategy
Firm-Level
Implications**

Winding River Consulting

Leadership & Growth Strategy for Accounting Firms and Professional Services



Leadership Development

Executive coaching, leadership pipeline building, and management training designed for accounting firm culture. Managing Partner facilitated training. New Partner Boot Camps.



Succession Planning

Proprietary Train Your Successor™ framework research-grounded, practitioner-tested, firm-ready. Strategic Optionality. M&A, PE transactions and transformations. Firm Structure. Embedded leadership on boards and through executive coaching.



AI & Talent Strategy

Helping firms understand and respond to how AI is reshaping hiring, development, and the career ladder. Fractional Human Resources, Innovation and technology and AI consulting.



Speaking & Keynotes

National keynote presenters at AICPA, AAM, CPAFMA, BDO Alliance, Upstream Academy and beyond. Partner retreats, firm state of the union.



Growth Strategy

Go to market strategy, digital design, niche focus, fractional CMO and consulting. Tech deck, talent stack, upskilling and alliance analysis.



Firm Diagnostics

AI Readiness Assessment, Culture Audits, and Succession Readiness scoring for managing partners and firm employees.

1st Survey Question

AI was here. - data mark 5-2026

67%

of firm leaders say AI is a top strategic priority

AICPA PCPS Survey, 2024

<20%

have a formal AI adoption roadmap

AICPA PCPS Survey, 2024

31%

average time savings in tax prep

Current (fka Crete), 2025 Tax AI Pilot

180→15

hours one accountant spent on returns — same season

Current Tax AI, 2025

BIG 4 REALITY: EY launched EY.ai. Deloitte built DARE. PwC committed \$1B. BDO USA mid-deploying Copilot + audit automation.

PE FIRM REALITY: Crete (now Current) proved mid-market firms can compete at enterprise scale * but only if they redesign how people develop.

SMALL(ER) FIRM REALITY: Budget heavy but hesitant. **Hurry up and wait.**

AI is here. 9-20-2026

No. 1

ranked issue by impact, in 5 of 6
firm-size groups — up from 4th–
5th two years ago

AICPA PCPS Top Issues Survey, 2026

64%

of firms plan to invest in or
upgrade AI this year, up from 57%
in 2024

CPA.com 2025 AI in Accounting Report

31%

average time savings in tax prep,
across 7,000 returns

Current (fka Crete) × OpenAI, 2026 Tax AI Pilot

180→15

hours one accountant spent on
returns — same season



OpenAI, "Self-Improving Tax Agents," 2026

BIG 4 REALITY: EY launched EY.ai and a new \$1B, 5-yr Microsoft alliance (2026). Deloitte retired DARE for Zora AI, its agentic platform (2026). PwC's original \$1B GenAI pledge dates to 2023. KPMG joined in with its own \$2B Microsoft AI alliance.

PE FIRM REALITY: Crete rebranded to Current (June 2026) — proof mid-market firms can compete at enterprise scale * but only if they redesign how people develop.

SMALL(ER) FIRM REALITY: Budget heavy but hesitant. **Hurry up and wait.**

1 of 2 AI Adoption in Accounting: The Acceleration Is Real (May 2026)

9%→41%

of accounting firms using AI
in just one year

Wolters Kluwer, 2025

46%

of accountants now
use AI daily

KPMG / Intuit, 2025

3×

growth in GenAI use
in tax & audit firms

Thomson Reuters, 2025

TOP AI USE CASES IN ACCOUNTING FIRMS

74% Document drafting & summarization

68% Tax research & regulation lookup

62% Client communication drafting

58% Financial data analysis & anomaly detection

51% Workflow automation & optimization

WHY ADOPTION VARIES — AND WHAT CHANGES WHEN IT LANDS



Top Barrier

No formal AI policy or governance
(most mid-size firms lack one)



Top Accelerator

Partner buy-in + structured 90-day pilot
with defined success metrics



Biggest Impact Seen

31% avg time savings in tax prep —
one CPA: 180 hours → 15 hours



Business Result

Mid-market firms now compete
with Big 4 on advisory capacity

AI Adoption in Accounting: The Acceleration Is Real September 26

9% → 41%

of accounting firms using AI
in just one year

Wolters Kluwer, 2025

60%

of tax pros use AI for
research weekly, up from 33%

CPA.com × Blue J, 2026

88%

used AI for a client service
in the past year — only 30% daily

Intuit QuickBooks, 2026

TOP AI USE CASES IN ACCOUNTING FIRMS

54% Data entry & transaction processing

53% Invoicing & payments

51% Financial forecasting

50% Client communication

49% Real-time client insights

WHY ADOPTION VARIES — AND WHAT CHANGES WHEN IT LANDS



Top Barrier

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(most mid-size firms lack one)



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Business Result

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with Big 4 on advisory capacity



Current (formerly Crete PA): What Mid-Market AI Actually Looks Like

THE MODEL

- Founded 2023 · Backed by Thrive Capital, Bessemer, ZBS Partners
- \$500M committed to acquire & AI-upgrade local CPA firms
- 30 firms · 2,000+ employees · \$500M+ annual revenue
- Rebranded to 'Current' June 2026 - signals the future they're building
- OpenAI embedded engineers building tailored tax/audit AI tools

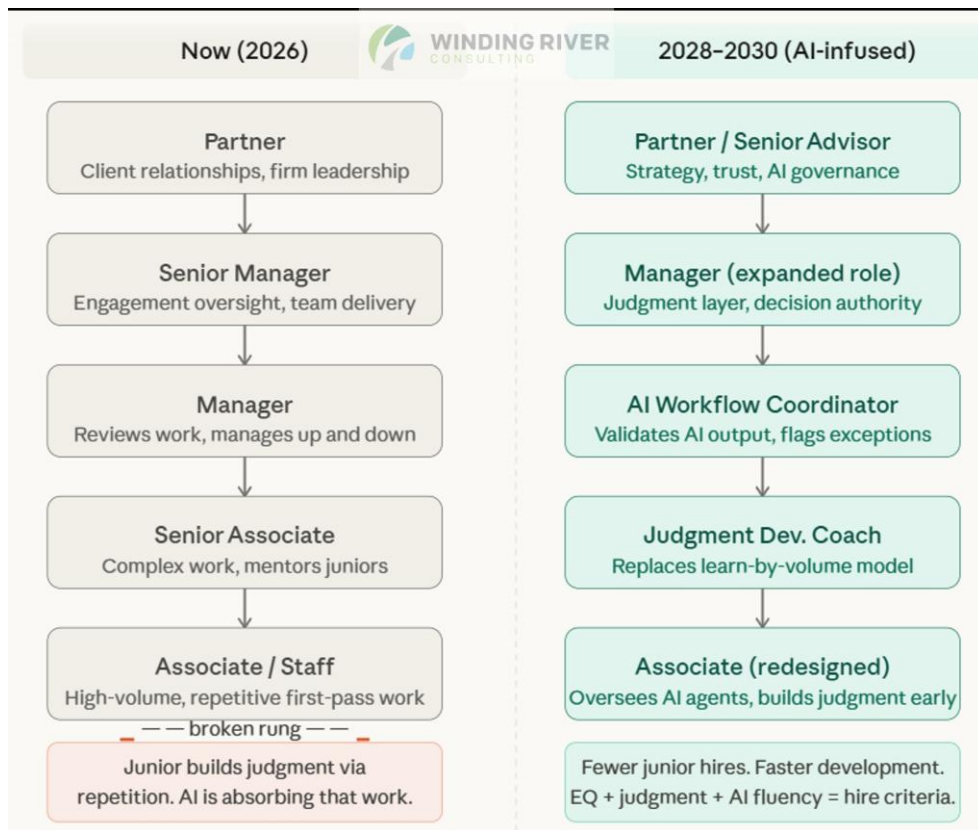
THE TAX AI RESULTS

- 31% average time savings in tax prep - 2025 pilot
- 98% accuracy across 7,000 returns processed
- One accountant: 180 hours → 15 hours, same season
- Freed time used to call every client, walk through returns
- Accounting Today Top 10 Firm for Technology, 2026 Fastest Growing

WHAT IT MEANS FOR YOU

- Mid-market firms can now compete with Big 4 on advisory capacity
- The work AI absorbed = what juniors used to learn from
- Development model must be rebuilt from scratch
- Firms that wait 2–3 years will have a 5-year talent gap
- Local ownership + shared AI = the new competitive advantage

The career ladder is changing. Rapidly.



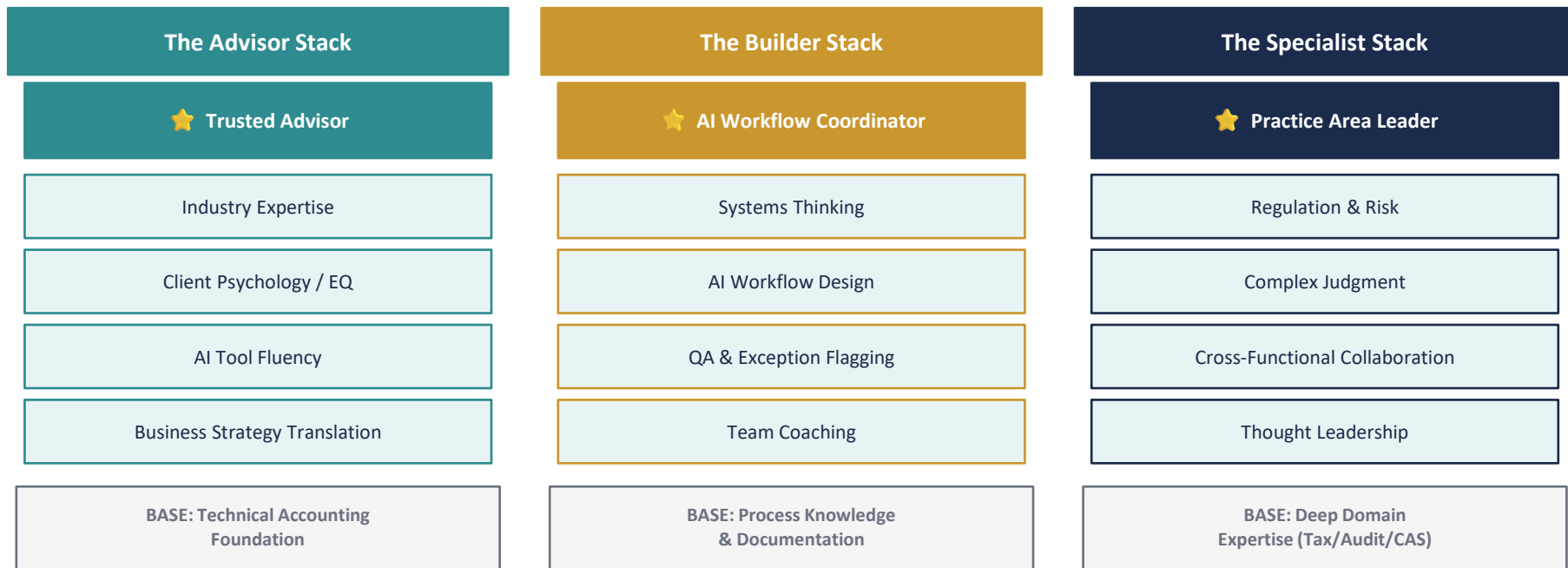
2nd Survey Question

Large Firms vs. Independent Firms: Who's Playing a Different Game?

CATEGORY	BIG 4 / LARGE FIRMS	INDEPENDENT / MID-MARKET
AI Investment	Billions: EY.ai, DARE, Copilot Enterprise	Tool adoption (Intuit AI, Karbon, Copilot SMB)
Training Capacity	Dedicated learning teams, AI academies, reskilling centers	Partner-led ad hoc; CPE as primary vehicle
Talent Pipeline	Campus recruiting at 200+ schools, brand recognition, agents, market share, internal recruitment teams, strategy	Competing with larger firms for fewer candidates
Development Model	Structured rotations, volume cushion, role specialization	Generalist model, learn-by-doing- AI is absorbing the doing
AI Governance	Risk, ethics, quality review teams in place	Most have no formal AI policy or guardrails yet
Competitive Position	'The threat is each other, not small firms'	Mid-market CAN compete with the right infrastructure and intentional strategy

The New Development Currency: Stack Skills, Not Years

In the old model, time IN ROLE was the proxy for readiness. In the AI model, the currency is skill combinations stacks that make a person uniquely valuable because AI can't replicate the blend.



New Hiring & Staffing Models for the AI-Infused Firm



Judgment-First Hiring

WHAT: Hire for EQ, critical thinking, and client communication ability not GPA or volume capacity.

HOW: Case-based interviews. AI simulation scenarios. Peer-interview panels. Skip the rote technical quiz.



Early-career, career-changers, liberal arts + accounting hybrids



Project-Based Staffing

WHAT: Use fractional/contract specialists for peak season instead of full-time juniors who get bored.

HOW: Fractional staff networks. Alumni return programs. Gig-model for specialized AI-assisted tasks.



Seasonal overflows, niche tax specialties, audit support



AI-Native Onboarding

WHAT: Day 1: every new hire learns the firm's AI stack. Technical training follows ~ not precedes.

HOW: AI fluency certification in first 30 days. Judgment simulation library. Coaching pairs, not task piles.



All new staff, but especially Associates and Senior Associates



Hybrid Offshore + AI

WHAT: Offshore teams handle AI-supported repetitive work; onshore staff own judgment and client relationships.

HOW: Clearly defined 'human judgment' vs. 'AI-assisted' workflows. Offshore teams trained on firm AI tools.



Mid-size firms scaling without adding headcount

Gen Z & Young Professionals: What the Research Actually Says

47
%

of Gen Z & Millennial employees fear AI
will replace their jobs

CPA Practice Advisor / Cox Business, 2025

41%

of adult Gen Zers feel anxious about AI
including those using it daily

Gallup / Walton Family Foundation, 2025

74
%

are using AI at work but they may not be
telling their managers

Deloitte Gen Z & Millennial Survey, 2026

48
%

of Gen Z & 46% of Millennials do not feel
financially secure (up from 30% in 2024)

Deloitte Global Survey 2025

KEY INSIGHT: Young professionals who experienced COVID are not anti-change ~ they're anti-change-without-context. They want to know why, what it means for their career, and that someone is investing in their development.

THE NEW REALITY

When AI Reinvents the Entry-Level Accountant

What the Research Says and What Firms Must Do

16%

Drop in junior
accounting hires
(Stanford, 2025)

41%

of firms now using AI
(up from 9% in 1 yr)
(Wolters Kluwer, 2025)

56%

wage premium for
AI-skilled accountants
(PwC, 2025)

AI automates the task ----- the role evolves upward

Tasks AI Is Taking Over

- ✕ Data entry & transaction coding
- ✕ Bank & account reconciliations
- ✕ Invoice processing (AP/AR)
- ✕ Tax return data population
- ✕ Generating standard financial reports
- ✕ Payroll processing & calculations
- ✕ Anomaly flagging in large datasets

Where Entry-Level Moves Next

- AI output review & quality control
- Client-facing data interpretation
- Exception investigation & resolution
- Workflow automation configuration
- Scenario modeling support
- Cross-functional project coordination
- ESG & sustainability data reporting

From technical executors → to AI-enabled analysts and advisors

ENTRY LEVEL STAFF

(Associate / Staff Accountant)

NOW: Data entry, reconciliation, processing

NEXT: AI oversight, QC, exception handling

NOW: Minimal -mostly internal

NEXT: More frequent -explain insights to clients

NOW: Technical accuracy, software proficiency

NEXT: AI literacy, critical thinking, communication

NOW: Hours billed for routine tasks

NEXT: Value-based for insight delivery

PRIMARY
TASK

CLIENT
TOUCH

SKILL
DRIVER

BILLING
MODEL

SENIOR CPAs / MANAGERS

(Senior / Manager / Partner)

NOW: Review & sign-off on team's work

NEXT: Strategic advisory, scenario planning

NOW: Periodic reviews, relationship management

NEXT: Continuous advisor, board-level conversations

NOW: Technical depth + staff oversight

NEXT: Judgment, EQ, business acumen, AI governance

NOW: Hourly + oversight supervision

NEXT: Subscription / retainer advisory

Skill Stack → AI literacy | Data analysis | Communication | Critical thinking

Skill Stack → Business acumen | EQ & coaching | AI governance | Advisory presence

How a Midsized Firm Scales Correctly with AI

64% of accounting firms plan to invest in or upgrade AI systems (CPA Practice Advisor / Accounting Today, 2025)

01

Audit Your Workflow Before Your Tech Stack

Map every recurring task by volume, rule-dependency, and judgment required. Prioritize AI for structured, high-volume work first (AP/AR, reconciliations). Don't automate broken processes.

02

Pilot, Measure, Then Scale

Run 90-day pilots on 1–2 AI tools with defined success metrics. Resist firm-wide deployment before proving ROI. Controlled scaling wins over speed.

03

Restructure Roles — Don't Just Layer Tools

Redefine entry-level job descriptions around AI oversight, QC, and exception handling. Create new titles (AI Workflow Coordinator, Client Insights Analyst). Build dual-track career paths.

04

Invest in AI Training as a Firm-Wide Mandate

AI-skilled workers command a 56% wage premium (PwC, 2025). Build tiered training: AI literacy for all staff, workflow management for seniors, AI governance and strategy for partners.

05

Evolve Your Service and Pricing Model

Shift from hourly billing to value-based advisory pricing. Package AI-enabled speed as a value-add, not a cost reduction. Introduce subscription advisory retainers.

AI Readiness Must Precede Deployment to Maximize ROI

Deployable capital is an enabler not proof that the organization is ready to absorb the technology.

CAPITAL AVAILABLE

≠

DEPLOYMENT READY

SEQUENCE MATTERS

01

DIAGNOSE READINESS

Assess workflows, data, governance, talent, and leadership alignment before selecting use cases.

→ **02**

ENABLE CHANGE

Build AI literacy, role clarity, change-management training, advisory support, and coaching.

→ **03**

DEPLOY & SCALE

Launch targeted use cases, reinforce adoption, measure value, and scale what works.

“Wait while learning” is not delay. It is deliberate strategy.

Readiness converts technology spend into sustained adoption and measurable value.

Metrics That Matter: Measuring AI-Driven Scale

Track what shifts, not just what you've deployed

EFFICIENCY

- ▶ Days to close monthly statements (Target: cut by 30–50%)
- ▶ Hours on routine tasks per staff member per week
- ▶ Error rate in AI-assisted vs. manual processes

CAPACITY & GROWTH

- ▶ Revenue per staff member (baseline vs. post-AI)
- ▶ Client capacity per partner (can you serve more?)
- ▶ New advisory service revenue as % of total

TALENT & ADOPTION

- ▶ AI tool adoption rate by staff level (% active users)
- ▶ Time to proficiency for new hires in AI workflows
- ▶ Internal promotion rate: technical → advisory track

CLIENT EXPERIENCE

- ▶ Client NPS (Net Promoter Score) before/after AI rollout
- ▶ Response time to client requests (hours, not days)
- ▶ Retention rate of advisory vs. compliance-only clients

What Actually Shortens the Path to Expert

What AI Now Absorbs

- ✕ Manual reconciliations & tie-outs, rep by rep
- ✕ Memorizing tax code/GAAP for pure recall
- ✕ First-draft return prep & data population
- ✕ Formatting, footing, cross-referencing workpapers
- ✕ Standard report generation & templated output
- ✕ Exception-free transaction coding
- ✕ Exposure gained only by chance, over years

What Still Builds the Expert

- Catching plausible-but-wrong AI output
- Judgment under ambiguity — real skepticism
- Client-facing conversations, real consequences
- Simulated case exposure, compressed in time
- Reading a room — when to push, when to yield
- Owning outcomes you signed your name to
- Calibration from repeated, varied real reps

THE MATH: 150 credit hours + 1–2 years supervised experience gets a CPA licensed. Reaching Advisor-level judgment has traditionally taken 8–10 years.

Turning Traditional CPAs into Advisors * Faster Than Ever Before

PHASE 1

Months 1–6

AI Fluency

+ Judgment Foundation

- AI tool certification (firm stack)
- Shadow 5 client advisory conversations
- Build personal 'judgment journal' what AI gets wrong
- Assigned mentor with structured bi-weekly check-ins
- First client communication solo (low-stakes)

PHASE 2

Months 7–18

Client Experience

+ Specialty Building

- Lead first end-to-end client engagement (supervised)
- Choose specialty track: Advisory, Tax Strategy, or Business Services
- Complete firm's business acumen curriculum
- Present insights in at least 2 client meetings
- Formal 360° feedback -EQ, communication, judgment

PHASE 3

Months 19–30

Advisor Identity

+ Relationship Ownership

- Own a dedicated client (5-10 accounts)
- Participate in client development activities
- Mentor a Phase 1 colleague
- Complete leadership communication training
- Produce one firm leadership piece

PHASE 4

Months 31–42

Senior Advisor

+ Succession Ready

- Map cross-service client relationships
- Develop AI workflow
- Complete succession pipeline development plan
- Complete firm AI governance training
- Produce content, panels, or other firm assets

 Compressed from 8–10 years to 36–42 months ~ if the firm builds the infrastructure.

The Human Side of AI Adoption & Why Change Management Is the Real Work

74% of Gen Z staff use AI at work but may not be telling their managers. (Deloitte, 2026) · 47% of Gen Z & Millennials fear AI will replace their jobs. (CPA Practice Advisor, 2025)

01 Create Urgency Without Panic

Share the data honestly. A 16% drop in junior hiring, firms 3× more likely to adopt AI in the next year. But frame it forward: 'Here's what's changing and here's how we're staying ahead.' Anxiety without context creates resistance. Context creates motivation.

→ *How are we sharing the AI reality with our team?*

02 Build the Guiding Coalition

Identify 2–3 change champions at each level not just the tech-curious partners. AI change fails when one person owns it. The coalition needs an early adopter, a skeptic who comes around, and a junior voice who feels heard.

→ *Who are our 2–3 change champions at each level?*

03 Communicate the Vision — Repeatedly

Young professionals aren't anti-change, they're anti-change-without-context. They want to know WHY, what it means for their career, and that someone is investing in their development. Say it more often than feels necessary.

→ *Have we told junior staff what AI means for their future?*

04 Anchor Change in Structure & Ritual

Change that isn't reinforced in systems reverts. Tie AI fluency to performance reviews. Celebrate AI wins publicly. Create a 'judgment journal' practice for junior staff. Build AI governance into leadership agendas not just HR offsite sessions.

→ *What rituals or systems will reinforce this change?*

Practitioner to Advisor: The 3-Year Acceleration

Year 1

Build the Foundation

Awareness & Orientation

- › Complete AI literacy training (firm-sponsored CPE)
- › Shadow 3+ advisory client conversations
- › Attend one business planning meeting with a partner
- › Learn to 'tell the story behind the numbers'
- › Identify 2 clients where you can add proactive insight

★ First advisory memo delivered to a client

Year 2

Develop the Practice

Application & Confidence

- › Lead at least one client advisory conversation monthly
- › Complete a business advisory or coaching certificate
- › Build a niche: industry vertical or advisory specialty
- › Co-develop one new advisory service offering
- › Shift 20% of billable time toward advisory work

★ Assigned a portfolio of 5+ advisory clients

Year 3

Own the Advisory Role

Authority & Scale

- › Lead your own book of advisory business
- › Mentor Year 1 practitioners on advisory mindset
- › Present at a client's board or leadership meeting
- › Contribute to firm's AI + advisory service strategy
- › 50%+ of revenue tied to value-based advisory work

★ Recognized internally as Trusted Advisor

The Advisor Skill Stack: What the Transition Actually Requires

Strategic Business Acumen

Industry knowledge, growth modeling, M&A/succession awareness

Client Advisory Presence

Active listening, facilitation, asking the right questions

Communication & Storytelling

Translating data into insight narrative over numbers

AI Literacy & Governance

Knowing what AI can/can't do reviewing, prompting, validating

Technical Foundation (CPA)

The non-negotiable credential, now the floor, not the ceiling



The Mindset Shift

Move from 'what do the numbers say?' to 'what story does the client want to write and how do we get there?'



The Revenue Shift

From hourly compliance billing → value-based advisory retainers. AI creates the capacity. Advisors capture the value.



The Market Signal

AI-skilled professionals with advisory capability command a 56% wage premium. The credential gets you in the room. Advisory skills keep you there.

Leveraging Outside Genius: Why Intentionality Changes Everything (Pattern-Recognition Engines)

The firms navigating this transition best are not doing it alone. They are being intentional about which outside voices they bring in, when, and why, and they are treating their BRN partners as strategic collaborators, not vendors.

WHAT FIRMS ARE USING CONSULTANTS FOR

- AI readiness audits & gap analysis
- Talent model redesign - before the crisis hits
- Succession planning & pipeline building
- Change management & partner communication
- Learning & development curriculum builds
- Recruiting strategy for the AI-era profile

THE INTENTIONALITY PRINCIPLE

- Know what you're hiring for- don't bring in a consultant without a specific outcome
- Brief your BRN partners on where you ARE, not just where you want to be
- Treat outside experts as thought partners, not order-takers
- Integrate their input into firm strategy, not just HR or ops
- Evaluate ROI explicitly and what changed because of this engagement?

WHY OUTSIDE GENIUS MATTERS RIGHT NOW

- Speed: No firm has time to build every capability internally
- Perspective: You can't see your own blind spots
- Credibility: Outside voices move resistance that internal ones can't
- Pattern recognition: Consultants see 20+ firms; you see one
- Accountability: External commitments get kept at a higher rate

Leveraging Outside Genius: Strategic Design Patters



Buy

Partner with platforms where the use case justifies it. AI can democratize tools once reserved for the largest firms - letting boutique firms compete in new ways.



Build

Build internally where it fits - especially the orchestration layer that connects your workflows, systems, and data the way you actually operate.



Borrow

Leverage the learnings of others. Lean on peers, early adopters, and partners who've already made the mistakes - don't reinvent the wheel.

Not buy-or-build on principle - decide based on the use case, the economics, and the strategic value to the firm.

AI Readiness Assessment™ * Where Does Your Firm Stand?

Rate your firm 1–5 on each dimension. 1 = Not started · 3 = In progress · 5 = Leading practice

AI Tool Adoption

Staff are using AI tools for real work tasks regularly

1

2

3

4

5

Psychological Safety

People feel safe to try AI, fail, and ask questions without judgment

1

2

3

4

5

Leadership Credibility

Leaders are visibly using and talking about AI , not delegating it

1

2

3

4

5

Shared Purpose

Staff understand WHY we're adopting AI and what it means for their career

1

2

3

4

5

Development Model

We've redesigned how juniors develop skills in an AI-enabled environment

1

2

3

4

5

Hiring Criteria

We've updated what we hire for - EQ, judgment, AI fluency are criteria

1

2

3

4

5

Add your scores → Divide by 6 → Under 2.5: Early Stage · 2.5–3.5: In Transition · Above 3.5: Advisor-Ready | Take the full digital assessment: windingriverconsulting.com/ai-readiness-survey

The Human Edge: AI Readiness Assessment

Discover where you stand on your firm's AI journey — and get a personalized roadmap to move forward with confidence.

● 5 minutes to complete

● 9 targeted questions

● Role-personalized results

WHAT THIS MEASURES

Based on the three cultural conditions that determine whether AI adoption succeeds or stalls in professional services firms, this assessment evaluates your personal readiness across the dimensions that matter most.

01

Psychological Safety

Your comfort with uncertainty, experimentation, and asking questions about AI

02

Leadership Credibility

Your visible engagement with AI and your ability to model curiosity for others

03

Shared Purpose

Your understanding of why AI matters and how it connects to your firm's goals

Scan to take our
**AI READINESSS
ASSESSMENT**



WINDING RIVER
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What the New Talent Architecture Looks Like and Why It Works

THE NEW ROLES

Partner / Senior Advisor

Strategy, trust, AI governance

Manager (expanded role)

Judgment layer, decision authority

AI Workflow Coordinator New Admin Role

Validates AI output, flags exceptions

Judgment Dev. Coach (QC)

Replaces the learn-by-volume model

Associate (redesigned)

Oversees AI agents, builds judgment early

Fewer junior hires. Faster development. EQ + judgment + AI fluency = hire criteria.



One Thing. 90 Days. Write It Down.

The research is clear: leaders who make a public, specific commitment are 3x more likely to act on it.

MY 90-DAY COMMITMENT

The one talent/AI challenge I'll tackle: _____

My specific first action: _____

Who I'll involve: _____

How I'll know it worked: _____

Dr. Rachel Anevski ranevski@windingriverconsulting.com · windingriverconsulting.com

Train Your Successor™ · Winding River Consulting · AI Readiness Assessment available at windingriverconsulting.com/ai-readiness-survey

References & Data Sources

Adoption & Use-Case Data

- Wolters Kluwer, Future Ready Accountant Report (Oct 2025)
- CPA.com × Blue J Tax AI Survey (June 2026)
- Intuit QuickBooks Accountant Technology Survey (June 2026)
- Thomson Reuters Future of Professionals Report (June 2026)

Impact & Methodology

- OpenAI, Self-Improving Tax Agents with Codex (May 2026)
- Current (fka Crete), 2026 Tax Season Pilot — 7,000 returns
- AICPA PCPS Top Issues Survey (2024)
- Accounting Today (2026 coverage)

NOTE: All figures fact-checked against original publications as of September 2026; two stats on the prior slide (daily-use rate, GenAI growth) were updated to reflect data published in the last six months.

- [AICPA Top Issues Survey: Firms' focus on technology rises \(Journal of Accountancy, June 2026\)](#)
- [2025 AI in Accounting Report \(CPA.com\)](#)
- [Global Survey Reveals Growing AI Adoption Gap \(AICPA & CIMA\)](#)
- [Building self-improving tax agents with Codex \(OpenAI, May 2026\)](#)
- [OpenAI Engineer Shows AI Cuts Tax Prep Time From 180 To 15 Hours \(Digg\)](#)
- [Crete Professionals Alliance Rebrands as Current \(BusinessWire\)](#)
- [Crete rebrands as Current, cuts tax prep time 31% across 7,000 returns \(Dealroom\)](#)
- [EY and Microsoft Form \\$1 Billion Global Initiative \(CPA Practice Advisor, May 2026\)](#)
- [Deloitte Unveils Zora AI \(PR Newswire\)](#)
- [KPMG to spend \\$2B in expanded AI alliance with Microsoft \(CFO Dive\)](#)
- [PwC US makes \\$1 billion investment in AI \(PwC, 2023\)](#)
- [BDO USA Unveils Comprehensive AI Strategy \(BDO, May 2025\)](#)
- [BDO unifies tax and accounting services with Copilot \(Microsoft Customer Story, 2024\)](#)