



Intuit's AI-powered tax innovation with Claude

Intuit successfully integrated Anthropic's Claude in Amazon Bedrock into TurboTax for the 2024 tax season. This initiative significantly enhanced customer experience, improved operational efficiency, and demonstrated the power of AI in simplifying complex financial processes.

Challenge

The American tax system presents significant challenges, with citizens spending 8.9 billion hours annually on tax preparation. The complexity is compounded by over 15,000 federal and state tax forms, creating an urgent need for clear explanations of intricate tax calculations.

Solution

Intuit developed an integrated solution through Intuit Assist for TurboTax, combining their proprietary tax knowledge engine and domain expertise with Anthropic's advanced language model, Claude, all built on Amazon's robust infrastructure and Amazon Bedrock platform.

Implementation strategy

The implementation centered on Intuit's GenOS (Generative AI Operating System) on AWS, utilizing Amazon Bedrock for streamlined LLM deployment and management. The team established a multi-region setup for enhanced resiliency and secured data through private VPC connections.

Key technical achievements

The system successfully scaled to serve millions of users during the 2024 peak tax season, achieving necessary latency and scalability through Provisioned Throughput while maintaining stringent data security and user privacy standards.

Results and benefits

The integration delivered clear, contextual explanations of tax calculations, boosting customer confidence in filing accuracy and improving federal tax filing completion rates while enhancing the scalability and management of AI services.

Future outlook

Intuit plans to expand AI integration across other financial management areas, maintaining its focus on "done for you" solutions in tax preparation while continuing to leverage cutting-edge AI technologies.

Key learnings

The project demonstrates successful large-scale AI integration in critical business processes, emphasizes the value of strategic partnerships between Intuit, Anthropic, and AWS, showcases AI's potential in simplifying regulatory-heavy processes, and exemplifies the delicate balance between innovation and data security in financial services.

"With Intuit Assist for TurboTax, we wanted to answer every customer's question about how they arrived at their final tax outcome, and we had to do it in clear, concise language, so they have peace of mind before they file. Anthropic provides exceptional support, giving us direct access to expert researchers who help us get the most out of Claude. Our close partnership has been instrumental in pushing output quality for our customers."

Nhung Ho, VP of AI at Intuit