blueJ

Buying Guide

Your Buying Guide for AI-Powered Tax Research Solutions

Inside This Guide

Tax law is complicated. Choosing the right AI-powered tax research solution doesn't have to be. To help you cut through the noise, we've put together this comprehensive guide on how to evaluate the features, capabilities, and support that really matter. So you can find a solution that gives you the AI advantage you've been looking for.

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01 How Tax Practitioners Are Using AI-Powered Tax Research Today

Already, AI is transforming the way accountants work. And nowhere is this more evident than tax research. In fact, our latest research shows that **54% of tax practitioners** are currently leveraging some form of AI to complete tax research. Beyond providing fast, reliable answers to pressing tax questions, these AI-powered tools are also helping practitioners make their day-to-day workflows more efficient, including:



Compliance work

Making sure income, deductions, credits and other adjustments are recognized and treated in line with federal, state, and local tax laws—freeing up your time to focus on more advisory work.



Strategic advisory work

Helping clients make informed, proactive decisions that reduce risk, minimize tax liability, and align with financial goals—by interpreting and applying tax laws relevant to their situation.



Client communication

Distilling complex tax topics into easy-to-understand client communications, such as emails, memos, presentation outlines, and more. Helping you reduce client response time and improve satisfaction.

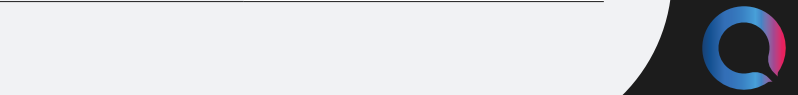


Training

Getting new team members up to speed—while also reducing reliance on senior team members for research reviews—with a trusted tool that helps them quickly gain an understanding of unfamiliar tax topics.

02 AI-Powered Tax Research vs. Other Tax Research Solutions

	General-purpose AI tools	Traditional tax research tools	Tax-specific AI research solutions
AI model	Use advanced LLMs but aren't fine-tuned for tax.	AI is often layered onto legacy systems, creating a clunky user experience and resulting in lower adoption.	Blend advanced LLMs with trusted tax sources to generate the best possible answers for tax practitioners.
Ease of use	Platforms are designed to be incredibly intuitive, but that ease of use often comes at the expense of answer quality.	Difficult navigation means users can't always realize the full value. AI add-ons help, but require multiple followup prompts and toggling between products to get a usable answer.	Users can ask questions conversationally and receive comprehensive answers immediately. No special training is required.
Content sources	Pull from a wide range of uncurated public sources, which are often outdated. Also lack access to proprietary content.	Pull from an expansive content library, but tend to skew towards editorial commentary. Each content library—federal, state—may require an additional subscription to access.	Pull from trusted, authoritative primary sources, expert commentary and case law. Updated daily to keep up with changes in tax.
Answer quality	Risk of "hallucinations" where AI confidently makes up facts. Answers can also be outdated and challenging to verify.	Require users to manually piece together multiple sources to arrive at an answer. AI add-ons can help, but answers often feel like simple source summaries.	Expert-grade answers backed by human oversight from a team of tax experts. Built-in user feedback channels continually improve answer quality.
Verifiability	Answers are often a "black box" with no inline citations or detailed source lists. When links do accompany answers, these can lead to older, unauthoritative sources.	Sources are available, but users must find, review and interpret them manually to arrive at an answer. AI add-ons help with more detailed citations and source lists, but often require users to toggle between screens to view sources.	Inline citations and linked source lists accompany every answer, making it easy to understand exactly where your answers came from. Sources can also be explored directly in-app, making it easier to verify answers.



03 What to Evaluate Before You Buy

Like all AI, tax research solutions are evolving rapidly. So it can be hard to keep track of which features and capabilities your firm really needs. To help you get started, we've gathered insights from tax practitioners on the evaluation criteria they used when selecting their solution. Using this list, you'll have a better sense of what to look for—and what to ask vendors about.

Answer quality

It doesn't matter how fast your AI-powered solution delivers tax answers, if those answers aren't defensible in front of clients, auditors, and regulators. Accuracy, transparency, and verifiability are all non-negotiable for tax research.

Questions to ask

- Is the answer accurate?
- Can the vendor provide any metrics about the overall accuracy of their answers?
- Does the answer layout make information easy to understand and follow?
- Can you easily verify where your answer came from using inline citations and source lists?
- If "yes" to above, can you explore sources without leaving the solution?
- Do they have in-house tax experts to test and refine their algorithms?
- Can you generate more comprehensive answers for complex topics with deep reasoning?

Content

The sources behind tax answers are just as important as the answers themselves. In order to get the best tax answers, your tax research solution should be trained on the full scope of tax code, regulations, expert commentary, and case law.

Questions to ask

- What kind of content is their model trained on?
- Does the content library incorporate federal, state and local tax sources?
- Is the content continually curated by tax experts?
- Do their answers prioritize primary, authoritative sources?
- Does the content library include expert commentary? If so, do they have partnerships in place to licence that content?
- How quickly are new tax laws incorporated into their content library?
- If they use web sources, how do they decide which sites to include?
- Can you upload documents as part of your prompt?

User experience

In order for a tax research tool to drive value in your firm, people need to actually use it. Ease of use and an intuitive experience ensure your team can get the answers they need with minimal training and much less frustration.

Questions to ask

- Can you ask questions conversationally using natural language?
- How long, on average, does it take for an answer to generate?
- How long, on average, does it take for new team members to learn how to use the solution?
- How often do existing users log in and use the solution?
- How much time do users save on average compared to traditional research and drafting methods?
- Can you easily create first drafts for client deliverables like memos, emails, and presentations?
- Can you draft longer-form research and reports for internal use?

Price and overall value

The true cost of a solution isn't just the total amount paid for license fees. You also need to factor in adoption rates to better understand your actual cost per active user.

Questions to ask

- What is the cost per licence?
- What's the solution's projected adoption rate and ongoing usage rate?
- Are there additional costs for access to new content libraries or additional features?
- Are pricing plans and contract terms flexible enough to meet the needs of your team?
- Are you able to easily add more users as your team grows?
- What is the average amount of time their users have saved after implementing their solution?
- Can you trial the solution at no charge before purchasing, to better understand the value it could add?

Security

Your clients are trusting you to keep their data safe and secure. When evaluating research solutions, make sure to check for proof of enterprise-grade security designations and best practices. In doing so, you'll protect both your clients and your reputation.

Questions to ask

- Does the tool comply with SOC 2 or similar security standards? Is the vendor willing to provide a report if you sign a Non-Disclosure Agreement (NDA)?
- Is user data stored, shared, or used to train their models?
- How often are databases backed up, incrementally and fully?
- Is the vendor continuously monitoring security controls?
- Are employees of the vendor required to complete annual security training?

Speed of execution

Beyond working for your firm today, your research solution should also grow with you. Choose a vendor that continually releases new features, responds to user feedback, and evolves its product roadmap both quickly and thoughtfully. This approach means you'll get even more value for your solution over time.

Questions to ask

- How often, on average, does the vendor release new features and capabilities?
- Will the vendor share which features and updates are on their immediate roadmap?
- How does the vendor prioritize updates?
- How does the vendor communicate updates?
- Does the vendor incorporate client feedback from tax practitioners specifically into their roadmap decisions and product improvements?

Post-purchase experience

Strong, ongoing support is what sets a partner apart from just another vendor. Reliable expertise, fast response times, training resources, and consistent platform availability will ensure your team stays productive when it matters most.

Questions to ask

- Is support offered after onboarding as needed?
- What is the vendor's average support response time? Average resolution time?
- Is there a defined process for escalating issues?
- What are the vendor's uptime and availability guarantees?
- Do they offer regular touchpoints to discuss adoption, usage, and tips to get the most out of your subscription?
- Is support included in the subscription or are there additional fees for premium tiers?

04 Making the Business Case for AI Tax Research

Choosing the right tax research solution can be a transformative investment for your firm. Already, leading accounting firms are adopting AI-powered tax research to improve efficiency, reduce wasted tech spend, and strengthen client communications. As more evidence builds around these benefits, even more firms will join them.

54%
report using AI for tax research

55%
agree that AI-powered tax research saves money

83%
agree that AI-powered tax research saves time

"With Blue J, we're confident that we are utilizing the products we are paying for now, and it is improving our employee and client experience."

Tanya Silves, Partner and Tax Practice Leader at Larson Gross Advisors

"When you're engaging in these complex advisory scenarios, all the shortcomings of your tech stack suddenly become unavoidable. You start to realize that the tech you're working with isn't just slowing you down—it's ultimately preventing you from doing your best work."

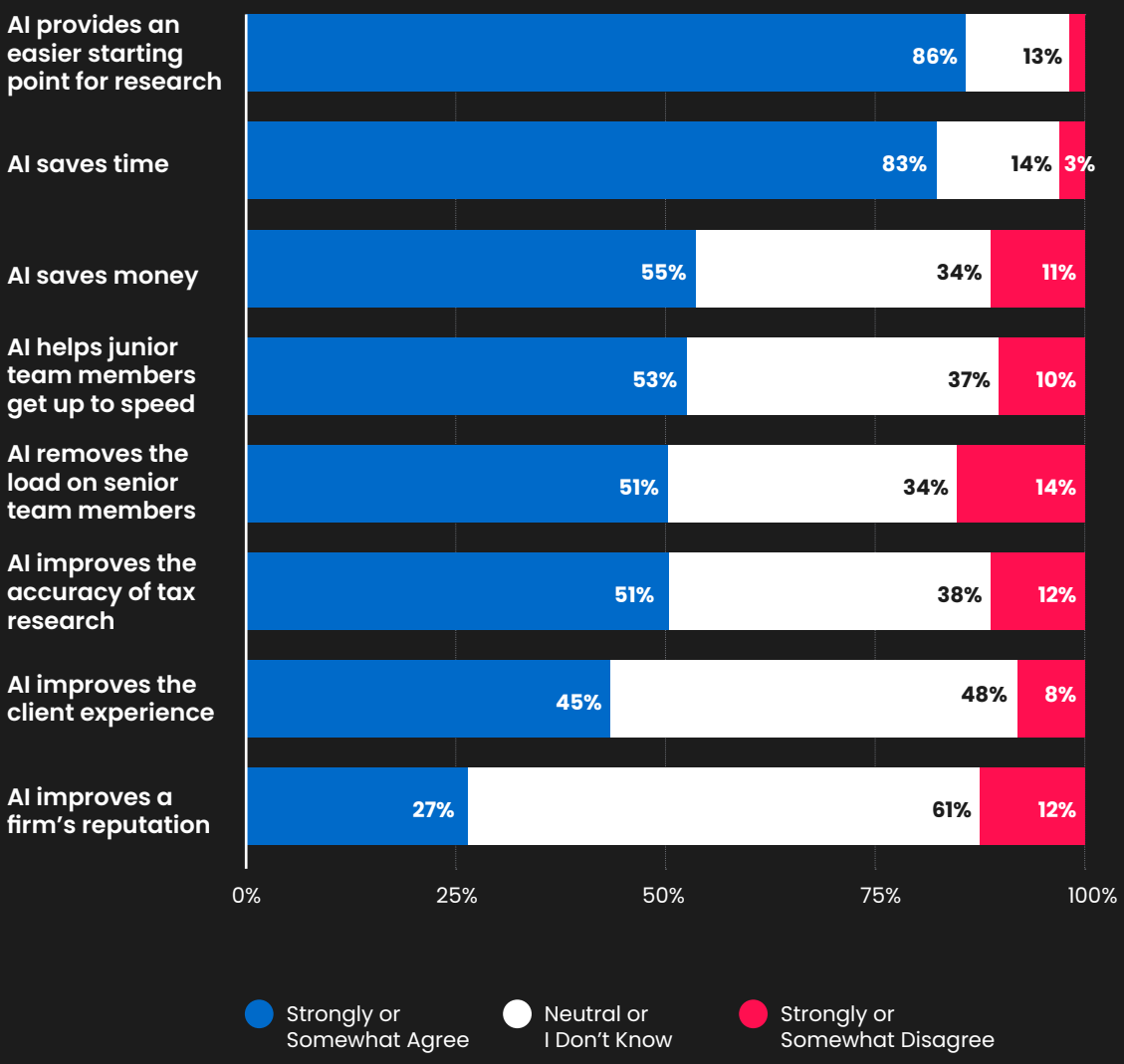
Founder and President, R2 Advisors, Rose Araghchy, CPA

The Advantages of AI Are Plentiful

Firms are bullish on the benefits associated with AI, including:

- Ease of research
- Time savings
- Cost savings
- Improved accuracy
- Smoother staff onboarding
- Better client experience

Sentiments on the Advantages of AI



Source: Blue J and CPA.com AI Tax Research Solution Outlook Report Survey

05 Overcoming the Roadblocks to AI Adoption

No matter how solid of a case you make for any given AI-powered tax research solution, you may still bump up against some barriers to adoption. But overcoming these barriers and securing buy-in is often far simpler than it seems. Here are some tips to get you started.

AI adoption barrier	What's the reality?
Fear of AI replacing human talent	**AI is about improving efficiency, not replacing people.** AI can help automate research and drafting, but human expertise is still needed for interpretation and decision making.
Worries around AI hallucinations and bias creeping into research work	**Tax-specific AI solutions safeguard against inaccurate or fabricated answers.** The AI hallucinations that have made headlines come from general-purpose AI tools. An AI solution built for tax research is trained on a specific dataset that is continually updated and vetted by experts. Plus, a solution like Blue J won't fabricate answers when it lacks the source material to respond or can't interpret the prompt. Instead, it simply responds with "I don't know".
Perception that AI tools are more expensive	**AI-powered solutions reduce wasted tech spend.** AI-powered tax research tools may cost more than general-purpose AI tools, but they provide a level of accuracy and reliability firms can't afford to compromise on. Their pricing is often lower than legacy research tools, yet adoption is significantly higher, leading to less wasted spend and more value realized.
Concerns around training requirements for new tools	**AI is intuitive to use.** Unlike legacy tax research tools that require users to master Boolean or keyword search strategies, AI lets them ask questions conversationally. It takes just 2.8 minutes to log in, onboard and generate your first comprehensive tax answer in Blue J.
Resistance to change	**Experiencing AI is believing.** Tax research has relied on familiar tools and processes for years, and many professionals are comfortable with the status quo. Letting your team test out AI-powered tools through pilots or phased rollouts helps them experience its impact first hand, build confidence, and recognize how naturally it fits into existing workflows.

06 Start Building Your Action Plan

Leading accounting firms already know just how much AI is transforming tax research. The firms that act now and embrace AI will be the ones to shape what comes next for the profession. While those that stick with the status quo risk being left behind.

If you want to keep your firm on the leading edge of tax, this guide provides everything you need to evaluate solutions, ask the right questions, and build a business case for confidently adopting AI-powered tax research.

Ready to discover how Blue J will transform your tax research?

Speak with one of our AI tax experts today

Get Started

Learn more at bluej.com

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