INTUIT Accountants | INTUIT ProConnect™ Tax

In just three years, Dat and his team grew Motta Financial from a solo operation into a 9-person firm supporting more than 600 tax returns, with projections of 850–1,250 returns next season.

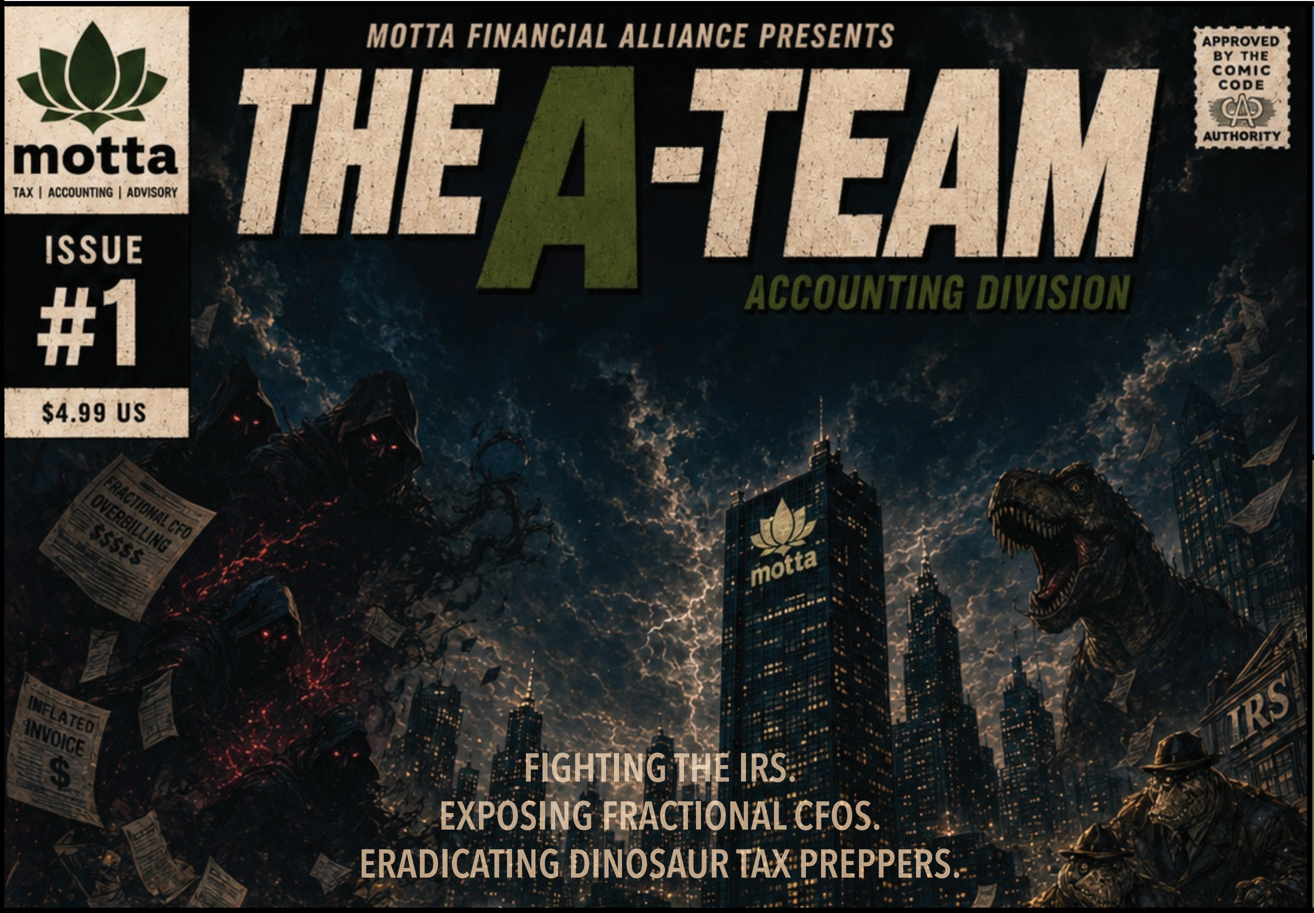
CASE STUDY

600+ returns | 9 Team Members

How Motta Financial built a scalable tax practice with ProConnect tax

KEY RESULTS

- 600+ returns in 3 years
- Projected 850-1,250 returns
- Prep time reduce to ~30 minutes
- Up to 80% less admin work
- Scaled with 9 professionals
- More capacity for advisory services



THE CHALLENGE

Rapid growth without adding administrative overhead

THE SOLUTION

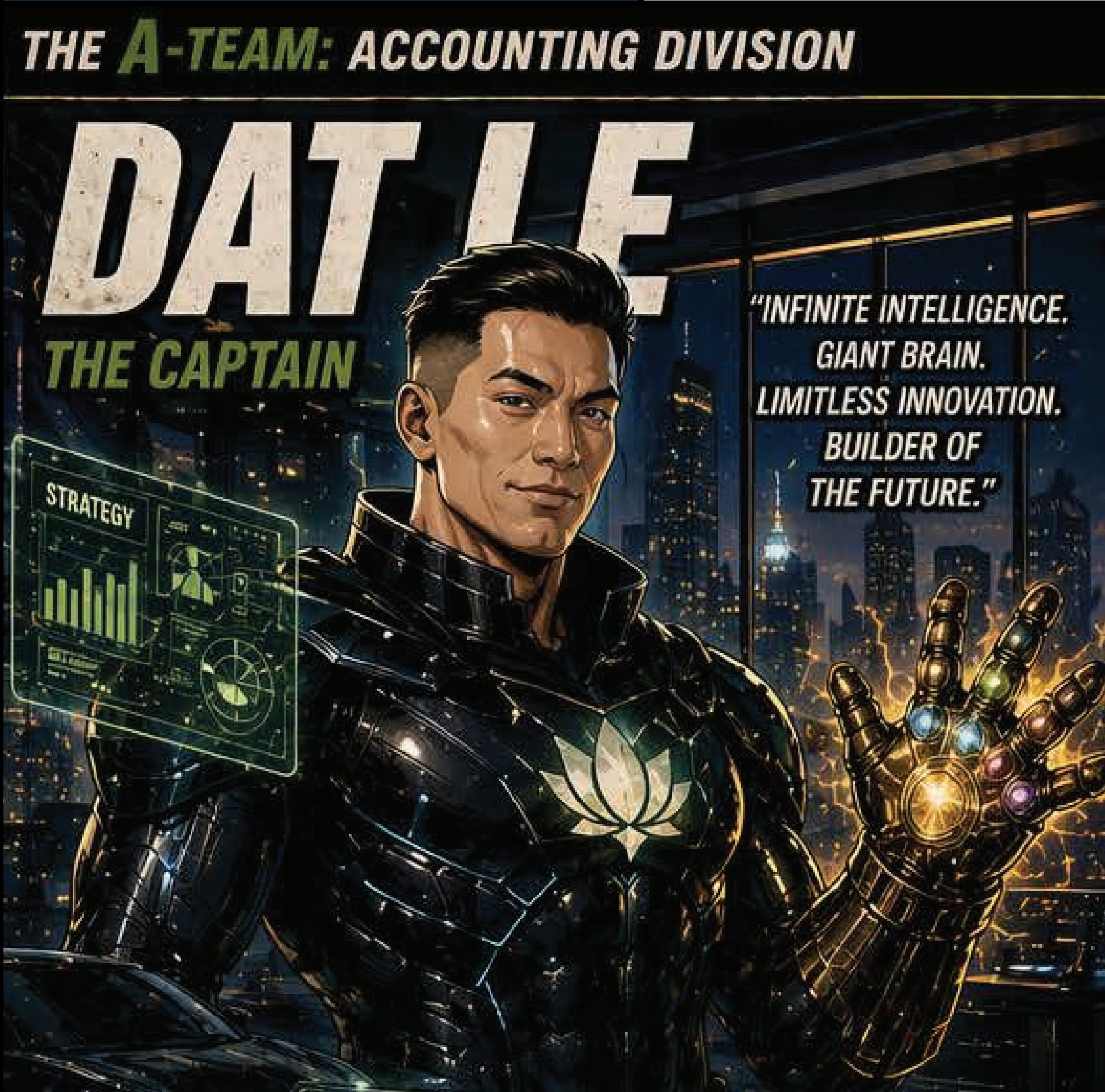
Automation, Books-to-Tax, AI workflows, and scale

Dat Le set out to build a firm that treats every dollar of client fees as sacred. ProConnect Tax gave him the operational foundation to do it.

Dat Le gets up at 4:30 every morning. For the managing partner of **Motta Financial**, early starts aren't a sacrifice. They are a signal of what the firm is built on: intensity, systems, and a refusal to let a single client dollar go to waste.

In just three years, Dat and his team have grown Motta Financial from a solo operation into a 9-person firm handling more than 600 tax returns in tax year 2025, with projections that could push that number to 1,250 for tax year 2026. The firm's clients include real estate investors, self-employed professionals, high-net-worth individuals with complex equity compensation, and businesses that need a fractional CFO. The firm is split roughly 65/35 between business and personal returns, with about half of those personal returns carrying a Schedule C or Schedule E.

That level of complexity, at that volume and with that team size, requires an infrastructure that must be organized, efficient, and productive, and at the center of Motta Financial's infrastructure is Intuit® **ProConnect™ Tax**.



SCALING PLAYBOOK

Scale through systems: Every workflow is designed to eliminate waste and reduce manual effort.

Technology first: ProConnect Tax serves as the operational backbone supporting the firm's growth.

Create capacity: Automation enables the team to spend more time on planning, advisory, and client service.

Grow without adding overhead: The firm's operating model is designed to support increasing return volume without proportional increases in staffing.

The Mottainai operating model

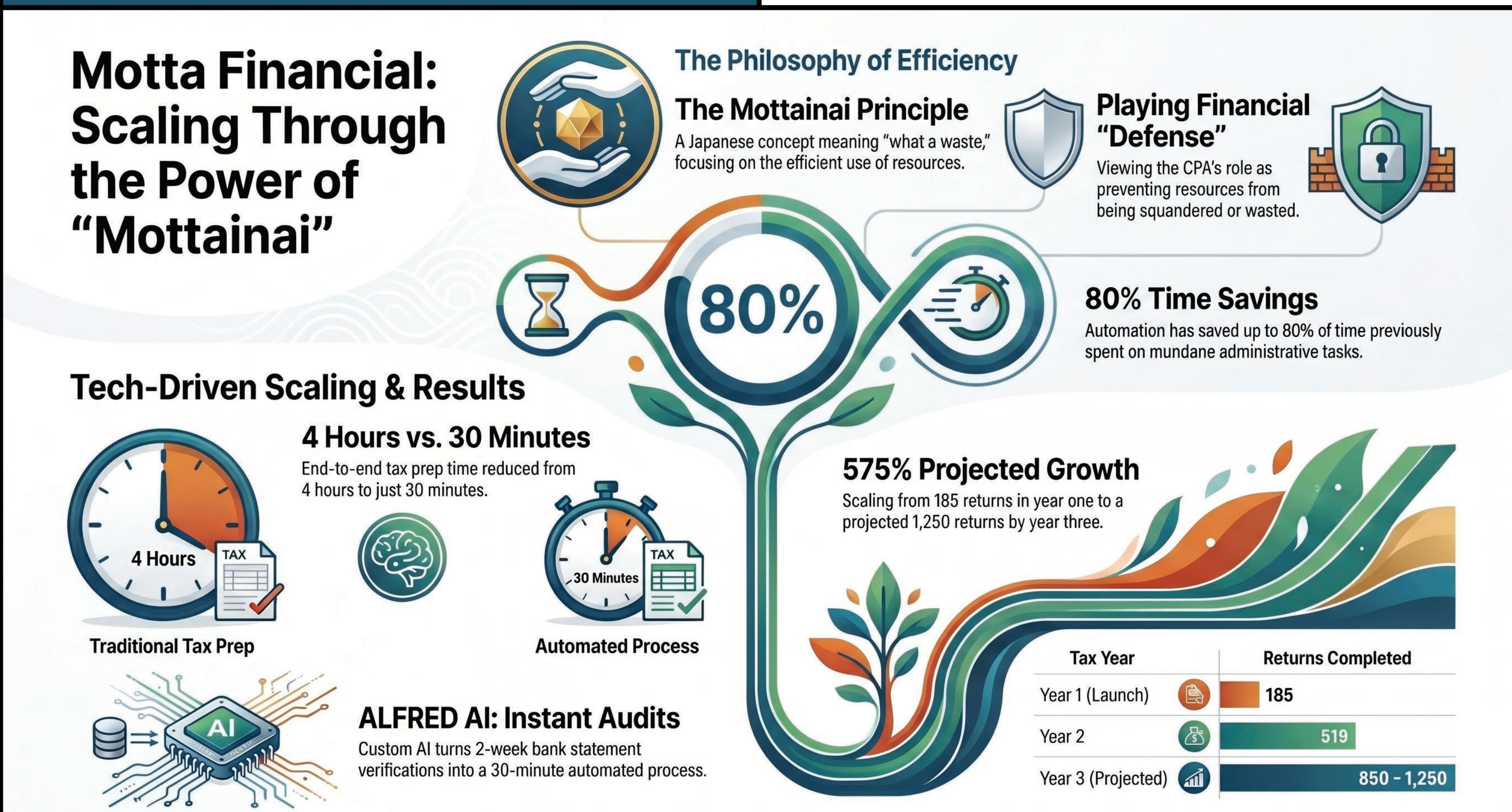
At Motta Financial, Mottainai is more than the firm's name; it is the operating philosophy behind every workflow decision. The concept roughly translates to "what a waste," and serves as the framework Dat uses to eliminate administrative work, automate processes, create staff capacity, and spend more time delivering value to clients.

"I've always felt that even if I'm the best CPA in the world, I can't generate revenue for a client," said Dat. "They play offense and score points. They generate income, and our job is to play defense and prevent money from going out. Mottainai is essentially the concept of being efficient with your resources. Our name is rooted in helping people and businesses do that."

This philosophy directly influences how the Dat evaluates technology, designs workflows, and allocates resources. By reducing time spent on manual tasks, the team creates capacity for higher-value advisory work and continued growth.

"We pride ourselves on ensuring the fees clients pay us are not for administrative activities and as many dollars as possible are going toward value-add activities such as consults, research, and planning."

That commitment led Motta Financial to adopt ProConnect Tax from its very first tax season. Three years later, ProConnect Tax remains the operational backbone supporting the firm's workflows, automation strategy, distributed team model, and growth.



ProConnect Tax: The operations foundation

Dat came to ProConnect Tax not as a switcher, but as a founder building a firm from scratch, which meant he could design his workflows around the software's capabilities from day 1, rather than retrofitting it into existing habits.

The most foundational feature, for a firm whose accounting clients are entirely on QuickBooks® Online, was the Books to Tax feature where the data from QuickBooks directly imports into ProConnect Tax. "All of our accounting clients are on QuickBooks Online, so the direct import, and other imports such as K-1s, has been critical."

What that integration does in practice is collapse what would otherwise be hours of manual data transfer into a near-instant handoff. When a client's books are reconciled in QuickBooks Online, the financials flow directly into ProConnect Tax, eliminating data re-entry and the errors that come with it. For a firm like Motta Financial with a 65% business return base, that's not a convenience; it's a structural efficiency that scales with volume.

On the individual return side, ProConnect's document import capabilities enabled something even more significant: the ability to distribute tax preparation work across a geographically dispersed team without sacrificing quality or turnaround time.

Motta Financial employs four team members based in Chennai, India. The firm's overnight workflow is built around ProConnect's import functionality: a client submits their documents, the Chennai team processes them in ProConnect Tax during US nighttime hours, and by the time the American team begins work in the morning, a prepared return is already waiting for review.

The practical effect of this workflow is dramatic. Dat estimates that the combination of ProConnect's automation, the QuickBooks Online integration, and the firm's broader tech stack has reduced average return preparation time from 3-4 hours to about 30 minutes, a more than 80% reduction in time spent on what the firm considers "administrative" work.

"With the Books-to-Tax feature in ProConnect Tax, the automation has saved us as much as 80% of our time on everyday tasks," he said. "This includes client communications, scheduling, and data entry, which is a gigantic time suck. This means we spend less time bogged down in data entry, and more time scaling and spending more time with clients to add value."

Case example: The K-1, before and after

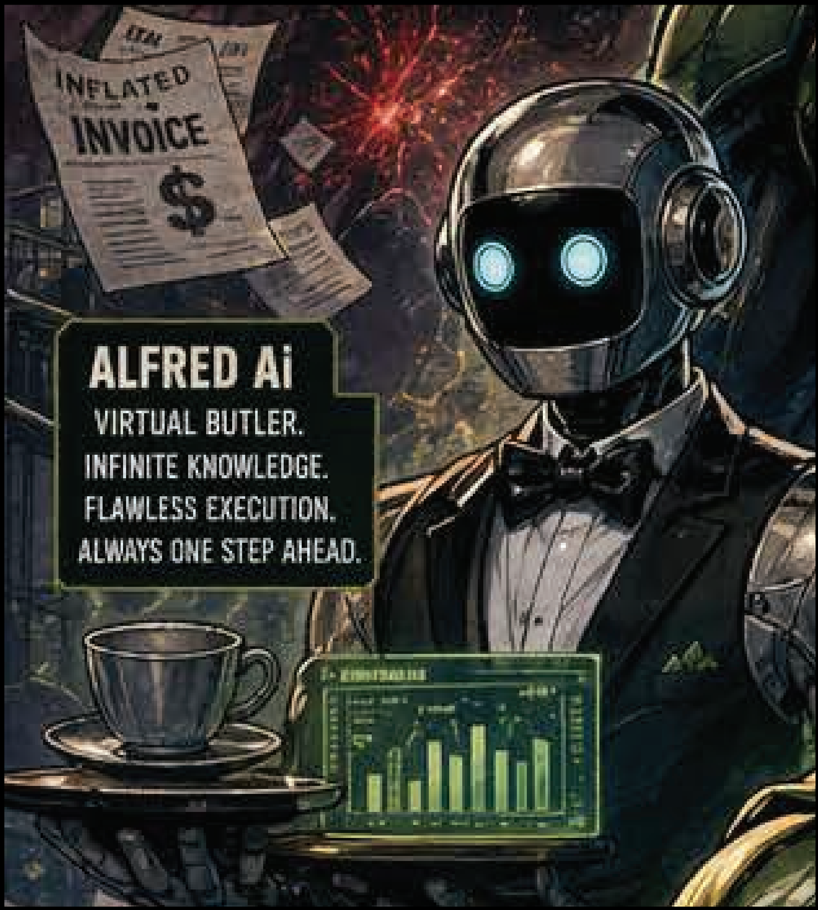
One of the clearest illustrations of what ProConnect Tax can do for a firm's efficiency and its ability to speed workflow didn't come from a direct Motta Financial client, but from a referral relationship.

Motta Financial white labels its accounting and tax services for a financial advisor based in New York City. When that advisor came on board, his clients were on a different platform. He was spending significant time manually processing K-1s and other tax documents, a labor-intensive process that didn't scale well with his book of business.

The solution: Dat's team migrated the advisor's clients to ProConnect Tax and implemented the platform's import features. The result was immediate and measurable. "He said that, alone, saved him a couple of weeks of data entry," said Dat.

This story points to a broader point about ProConnect Tax as it relates to firm growth. The platform's value isn't just in the time it saves on individual returns; it's in the firm's ability to absorb new client relationships, including complex, multi-client referral channels, without a proportional increase in staffing or admin burden.

FIRM AT A GLANCE	
Firm	Motta Financial
Founded	2023 (launched fall 2023)
Locations	Las Vegas, Nevada and Boston, Massachusetts; most of the staff work remotely
Partners	Dat Le, CPA, managing partner
Team size	9 (including 4 in Chennai, India)
Tax returns	Average of 600
Tax year 26 projected	850–1,250 returns
Specialties	Business tax, real estate, equity compensation, CFO services, financial planning
Tech stack	ProConnect Tax, QuickBooks Online, Karbon, Ignition, OpenAI/ALFRED, Calendly, Airtable, Zoom



Meet ALFRED: AI layered on top of ProConnect Tax

Technology foundation

- ProConnect Tax
- ALFRED AI
- Distributed team workflow

Motta Financial's workflow with ProConnect Tax is integrated with the firm's AI agent, ALFRED, or Artificial Liaison for Rapid Efficient Delivery. ProConnect Tax is the foundation for the firm, while ALFRED enables distributed team workflow, client intake, document processing, and financial modeling.

Scaling without adding overhead

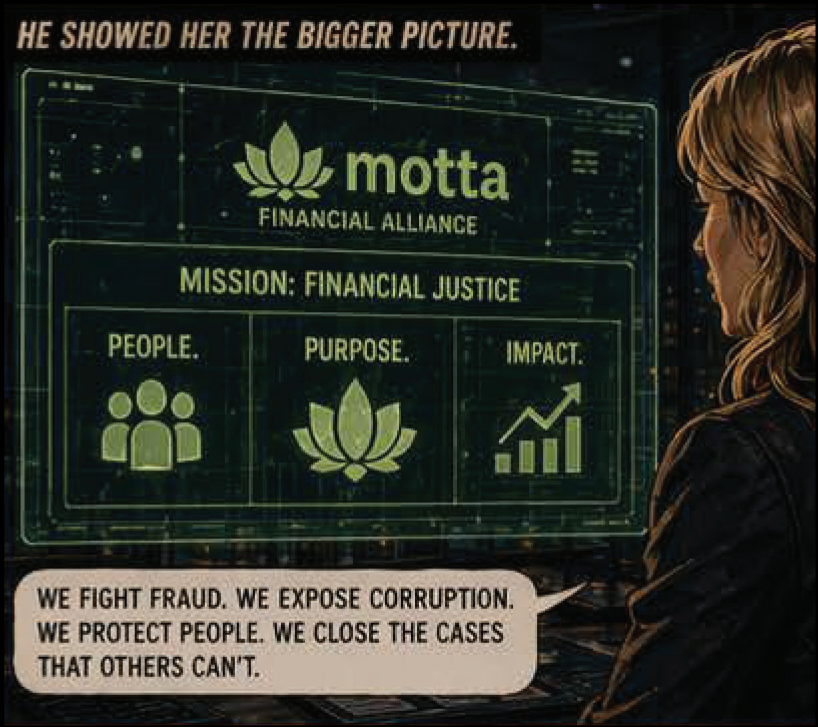
Motta Financial completed 519 returns in tax year 2025, nearly three times the 185 the firm completed in its first full year of operation. The firm currently has 606 returns confirmed for tax year 2026, with 50 more on extension. Dat projects the final number could reach 1,250 depending on the mix of business and personal returns.

That growth has come without a corresponding expansion in headcount. The firm has nine team members, and Dat's expectation is that the systems the firm built, including **ProConnect Tax's import workflows**, the overnight India operation, and ALFRED's automation layer, will allow the team to continue absorbing volume without hiring more staff.

Because the core software is ProConnect Tax, his expectations for efficiency and the client experience are integral to success. Because the team spends dramatically less time on data entry and administrative tasks, they have more capacity for client-facing work, which produces better outcomes, stronger relationships, and the referrals that fuel further growth.

"Since we can do things more efficiently through tech, we can spend more time speaking with our clients because we aren't bogged down with data entry," said Dat. "Our team can take on more volume. Our clients get a great product, so we've been able to grow through referrals and stay lean."

"We ensure client fees go toward value-add activities, not administrative work."
– Dat Le, managing partner



The most common complaints Dat hears from prospects about their former tax accountant include slow turnaround, no communication, and a return that arrives with no explanation attached: "It's always: 'I give my accountant my documents, I can't talk to them, they spit out a return eventually, and I don't understand what just happened. They're impossible to get on the phone and I dread taxes every year.'"

ProConnect's automation addresses the turnaround problem, while ALFRED addresses the communication and accessibility problem. Together, they address the experience problem, which is, ultimately, what clients are paying for.

Advisory at scale: niches drive value

At Motta Financial, efficiency is not the end goal. Instead, Dat describes it as the prerequisite for the work that actually matters: advisory, planning, and the kind of high-touch engagement that justifies the firm's fee structure and drives its referral base.

Motta Financial's advisory practice spans several niches, each requiring depth that he believes most generalist firms struggle to provide. On the business side, the firm offers a full suite of CFO-level services: mergers and acquisitions support, due diligence, business and tax planning, budgeting and forecasting, pre-409A valuations, and entity restructuring. For individuals, Motta Financial offers a full financial planning practice alongside tax, a combination that allows the firm to offer holistic financial guidance to high-net-worth clients and business owners.

Two niches in particular have become defining areas of expertise. First, real estate. The firm works extensively with realtors, mortgage brokers, and rental property owners, drawn in part by Dat's own investment background and his conviction that real estate offers the most tax-efficient investment available. The second is equity compensation, a space he developed expertise in during his time at a previous employer where he worked extensively in debt and equity. This includes deep knowledge of ESPPs (employee stock purchase plans), RSUs (restricted stock units), and ISOs (incentive stock options).

"There aren't a ton of people in the tax space who understand the mechanics around ESPPs, RSUs, and ISOs," he said. "For tax advisory, we do a lot of work in equity compensation analyses to help plan for the tax implications for our clients at pre-IPO companies."

That advisory depth is only possible because the administrative work has been automated. When a senior professional's time is not consumed by data entry, it becomes available for the kind of discrete, client-specific research and planning that constitutes real value. Value that helps clients more easily refer others to the firm.

A journey toward zero manual entry

Dat describes Motta Financial's current state as "almost there" on the path to eliminating manual data entry entirely from the firm's workflow. The remaining gap, in his assessment, is the ProConnect Tax-ALFRED integration, a piece that would close the loop between client data collection and return preparation without human intervention.

The firm's broader ambition is a workflow in which a client submits documents, ALFRED processes and categorizes them, the information flows automatically into ProConnect Tax, and the overnight India team completes preparation, all before the US team's morning review. The client intake process is already largely automated: clients schedule meetings via Calendly, meetings are recorded and notes distributed automatically, and intake form data is routed directly into the firm's project management and CRM systems.

"We're almost there," said Dat. "Once the client sends data, the information is integrated into our systems. The piece we're still working toward is having that flow directly into ProConnect without any manual handoff."

For a firm founded on the principle of eliminating waste, that orientation toward continuous improvement is not incidental. Every automation the firm builds and every "minute found," in Dat's phrase, is reallocated toward client relationships, referral networks, advisory engagements, and the kind of high-complexity work that a lean team can handle when they are not buried in administrative tasks.

"All of our people are vigilant about finding minutes," he said. "If there's an automation to build, our special teams will work to build that functionality. The biggest thing that's helped is putting out a good product, and through technology, we can spend more time with clients because we aren't bogged down with data entry."

The numbers reflect that orientation. **Motta Financial is a firm built on the conviction that every client dollar should go toward value.** Now that's a win-win.

Q: If you could be a superhero, which one would you be?

Dat: I love this question! The first Ironman came out during a very formative year for me. I've always gravitated toward the saying, "If you are really good at your job, you can be as eccentric as you want and people have to deal with it" personality, so I have to say it would be Tony Stark. A close second would be Christian Bale's Batman because of the flashy surface-level image, but also his true intentions to help those who need it. Early in my career, the moniker "Datman" somehow caught on so now I have a Datmobile, Datman Utility Belt, and a rental property I put under an LLC called "The Dat Cave LLC."

Q: If you were stranded on a desert island with access to only one piece of technology or service, what would it be and why?

Dat: I believe the obvious answer would be a cell phone, but that felt too easy. I'm just coming off a busy season and about 1,500 text and email messages behind.

If I were on a desert island, I would want a TV with an antenna, or whatever the kids are using these days, so I can still watch my Boston Celtics. Actually, being on an island where no one can call or text you sounds pretty awesome!

Q: What kinds of things do you like to do in your spare time?

Dat: That's easy. I play with my dog Brody, who is also my "son," moonlight as an adjunct at my alma mater, Suffolk University, and play golf.