WRIGHT ACCOUNTING SOLUTIONS | TAX AND ACCOUNTING

How One Solo Practitioner Skipped the Hire With AI-Powered Intake

Brenna Wright, CPA, MBA, runs a busy, largely international tax practice on her own. **SmartRequestAI® took over the document chase that had her looking to hire an assistant, and now she's weighing a tax preparer instead.**

373 SmartRequestAI requests sent, working on her own, as of Aug 31, 2026

10+ yrs Preparing returns in ProConnect, with SmartVault alongside

01 — THE CHALLENGE

Wright runs her practice alone and has more referrals than she can take. Each year she built a Microsoft Form from scratch, checked every response by hand against the prior return, and chased missing items by email. Replies often took days, and she was forced to turn away referrals as she had no time to scale.

02 — THE SOLUTION

SmartRequestAI replaced each step of that routine. It builds the questionnaire and document request list from each client's prior year return, so Wright no longer starts from scratch. Clients with foreign accounts entered bank transactions directly, with no statements to hunt down and no spreadsheets to build.

Automated Reminders took over the follow-up, even proving value post-season. They kept track of what she was still waiting on from clients, including after tax season ended, when she isn't actively following up. "It definitely saved me there," Wright says, "and that made me not look like I was dropping the ball."

Before SmartVault

> I had actually been looking into getting an **administrative assistant** for some of the gathering of information.
>
> Brenna Wright, CPA, MBA

HOW SMARTREQUESTAI WORKS

1. **Prior year return** is the starting point
2. **SmartRequestAI** builds the questionnaire and request list
3. **Clients confirm or update it**, including foreign bank transactions
4. **Completed data pushes into ProConnect,** creating a draft return in the tax software

ON CLIENTS ENTERING FOREIGN BANK TRANSACTIONS DIRECTLY

"They didn't have to find a spreadsheet or put anything together, because everything was right there."

Brenna Wright, CPA, MBA · Wright Accounting Solutions

NO LONGER NEEDED

~~Hunting down statements~~

~~Building spreadsheets~~

03 — WHAT CHANGED FOR WRIGHT

No admin hire

Now weighing a tax preparer who adds client capacity instead

More time for referrals

Time freed from the document chase can go toward the clients she used to have to turn away.

Drafts, direct

Sent to clients straight from SmartVault, with no download and re-upload

Wright has since added more Requests and tells other CPAs she knows about SmartVault.

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