



CASE STUDY

How Seed Money Consulting scales high-value advisory services with Intuit® ProConnect™ Tax and Intuit Tax Advisor



Shahab Maslehati, ChFC, CFE

Founder

Firm Profile

- **Firm:** [Seed Money Consulting](#)
- **Headquarters:** Denver, Colorado
- **Reach:** Serving clients across the U.S. and globally.
- **Focus:** Tax planning, financial advisory, and small business consulting.
- **Core tech stack:** [Intuit® ProConnect™ Tax](#), [Intuit Tax Advisor](#), [QuickBooks Online](#), [Intuit Select Pro Staffing](#)

The challenge

As a former federal bank examiner, **Shahab Maslehati** saw firsthand how tax and financial complexity weighed heavily on individuals and business owners. He founded Seed Money Consulting to do more than just file returns; he wanted to **empower clients with proactive financial insight**.

But delivering consistent, high-quality Advisory Services at scale proved difficult. Manual work, Excel-based planning, and disconnected tools slowed his team down. Shahab needed a better way to systematize tax planning, while maintaining a personalized client experience.



The solution

Shahab turned to **ProConnect Tax with tax advisory and planning built in** to create a scalable, repeatable advisory offering.

By combining ProConnect Tax's detailed tax return data with Intuit Tax Advisor's strategic planning engine, Seed Money Consulting now delivers **on-demand, client-ready tax strategies** backed by real numbers—not guesswork.

"ProConnect Tax powers everything. It's the engine that drives our advisory planning with Intuit Tax Advisor. Without it, we'd still be stuck in spreadsheets." – Shahab Maslehati, founder, Seed Money Consulting

With this connected ecosystem, Shahab's team can:

- Pull prior-year data directly from ProConnect Tax into Intuit Tax Advisor.
- Model "what if" scenarios using full tax return inputs.
- Show clients clear savings and next steps, all in one meeting.

The Impact

✓ Scalable Advisory Services

With ProConnect Tax + Intuit Tax Advisor, Seed Money Consulting built a quarterly advisory cadence tied to real-time life and business events, helping clients optimize decisions year-round.

✓ Greater client confidence and satisfaction

Clients now leave meetings with concrete strategies, actionable next steps, and clear tax savings. The result: Stronger relationships and more referrals.

✓ Operational efficiency

ProConnect Tax and Tax Advisor eliminated manual entry, and Select Pro Staffing helped offload compliance tasks, freeing up Shahab's team to focus on high-value advisory work.

"I used to work until midnight during tax season. Now I'm home for dinner and still delivering more value to clients than ever."

Real client example: A picture is worth a thousand words

One client, a photographer with dreams of living in Greece, didn't believe it was financially possible to make this happen. Through strategic tax and financial planning using ProConnect Tax and Intuit Tax Advisor, Shahab helped her structure a photography business, explore real estate incentives, and ultimately make her dream a reality.

"Tax Advisor helped us turn her idea into a plan. ProConnect Tax gave us the real-time data to support it. Now she lives part-time in Greece, running a business she never thought possible."

Why ProConnect Tax works

The combined power of **ProConnect Tax** and **Intuit Tax Advisor** gives Seed Money Consulting a clear edge with:

- Data-driven insights from the tax return.
- Automated plan generation and tax-saving strategies.
- Professional client reports and year-round value.

See it for yourself

By using ProConnect Tax with Intuit Tax Advisor built in, **Seed Money Consulting has transformed advisory from a nice-to-have service into a firm core offering**—and also grown its business in the process.

"We're not just filing tax returns. We're helping people reach their goals faster. That's the power of connected tools like ProConnect Tax and Intuit Tax Advisor."

As a cloud-based professional tax software, ProConnect Tax modernizes your workflows by taking care of tedious, low-value tasks. Larger firms will benefit from custom pricing options with tax return bundles of every size.

Ready to see ProConnect in action?
Call **844-818-5406** today to get started or
[schedule a demo](#) with a tax software specialist today.