



WHITE PAPER

# How to attract and maintain Gen Z talent in your tax and accounting firm

Intuit® ProConnect™ Tax



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## Executive summary

As a new generation continues to enter the workforce, it is important to understand the impact on the tax and accounting profession. Generation Z, or Gen Z, approaches their careers, values, and personal time unlike any generation before them. Sometimes called “Zoomers,” the number one trait is that they feel they can’t build a stable life as easily as their parents did, while also requiring a strong sense of purpose and other requisites to maintain job satisfaction.



While [enrollment](#) in college programs is improving, accountants are leaving the industry in droves. According to the [Finance and the Great Reshuffle](#) report from the AICPA & CIMA in cooperation with PwC, almost 25% of finance workers said they want to change their jobs within a year, while more than half of respondents (52%) said employee turnover within their organizations is increasing.

This begs the question: **How can firms attract and maintain new talent?** Rather than bemoan the stark differences between Gen Z workers and older generations, a more informed and beneficial discussion is getting a grip on harnessing Gen Z strengths in order to give the tax and accounting profession a boost.

## Key issues highlighted in this whitepaper

### Understanding the strengths and values of

**Gen Z:** The unique conditions in which Gen Z grew up have influenced how they navigate their personal and professional lives. Their strengths and values are impacted by this, and should be taken into account rather than cast aside.

### Building a workplace that Gen Z wants to

**join:** Zoomers want to be compensated fairly, have flexible work environments and schedules, and make a difference through their work. Firms meeting them where they are is the first step to creating a workplace they will thrive in.

### Retaining Gen Z accountants in the long

**term:** In order to foster long-standing working relationships with loyal Gen Z employees, it pays to build your firm with a mission. Making an impact is top of mind for younger workers, as is a people-first culture.

So sit back, grab your favorite beverage, and learn more about Gen Z in the profession. It’s a wild ride.

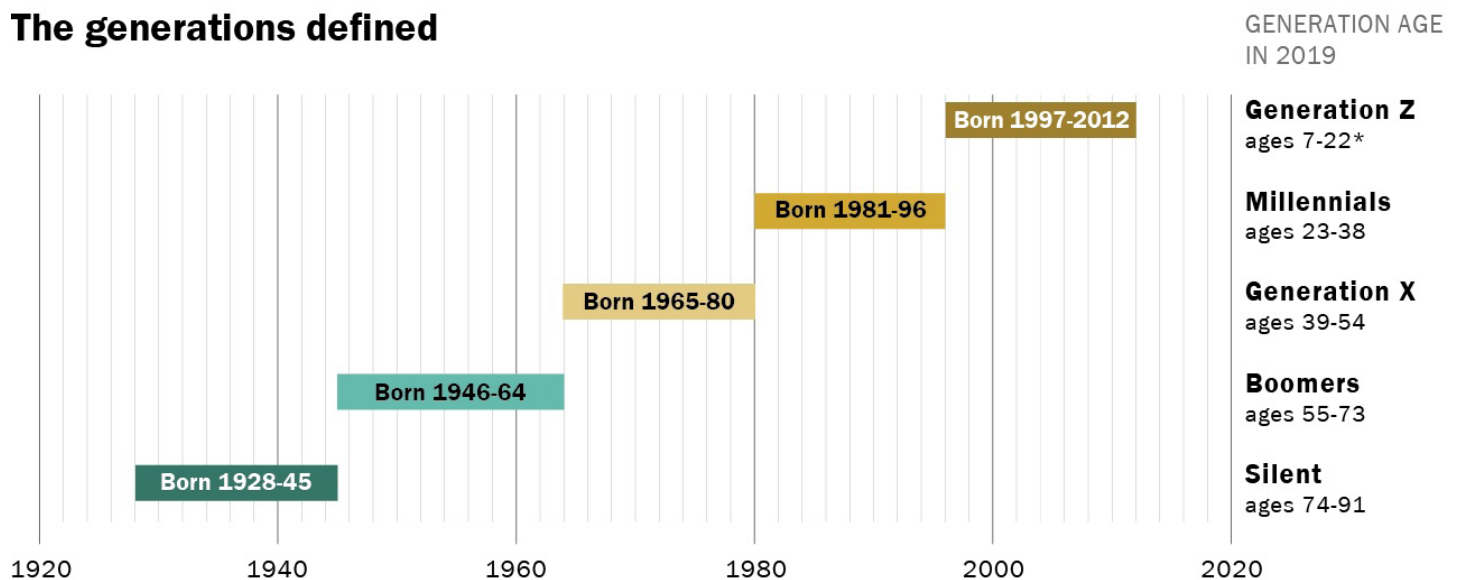
## Working with Gen Z

In order to hire, work with, and retain Gen Z employees, it's important to understand their attitudes and preferences. It's a classic case of nurture vs. nature; these traits and beliefs were largely shaped by the environment they grew up in: An economy where stability was not guaranteed. Rather than simply clocking in at 9 a.m. and clocking out at 5 p.m., Gen Z seeks fulfillment from their work and wants to bring their whole- and best-selves to the workplace.

### Defining Gen Z

Firms and hiring managers should know exactly who counts as a member of Gen Z. This group is made up of individuals born between 1997 and 2012, a very wide range compared to some other generational groups. That means, in 2025, the oldest members of Gen Z will be in their late 20s, while the youngest will still be in middle school. Gen Z is sandwiched between Millennials and Generation Alpha, and in general, members of Gen Z are digital natives, deeply socially and environmentally conscious, and lean more financially conservative.

### The generations defined



\*No chronological endpoint has been set for this group. For this analysis, Generation Z is defined as those ages 7 to 22 in 2019.

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Generally speaking, most of my peers are money-conscious in lifestyle, saving, and investing. Given the state of inflation, interest rates, and increased cost of living these last few years, nearly every Gen Zer I know is very conscious of lifestyle spending on rent costs, car payments, and groceries. – **Zachary Stoner, Dark Horse CPAs**

## Opening the funnel earlier

The accounting profession is hurting for CPAs, enrolled agents, and tax accountants. And age does not seem to matter; more than 300,000 of them have left the industry in the last five years, according to [Fortune](#). Of those remaining, about 75% are expected to retire sometime in the next decade. What's clear is this: The funnel must be opened earlier than before in order to extend the accounting talent pipeline.

A [2024 study](#) by Edge Research and the Center for Audit Quality found that high school is a crucial time, particularly during freshman and sophomore years. The study also reported that students are more receptive to entering the accounting field in general, as they see value in its good pay, career adaptability, and job security.

## Rethinking education

In the recent past, the path toward becoming an accountant was pretty straightforward: Pursue a bachelor's degree in accounting or a related field, and then earn the credentials to become a CPA. Now, however, there are calls to [decrease the barriers to becoming an accountant](#), with several states nixing the 150-hour education requirement.

As a pragmatic and somewhat financially conservative generation, Zoomers are weighing the high costs of college while still prioritizing job security and job flexibility. "Many believe that higher education should evolve to better prepare young people for the rapidly changing nature of work," reads Deloitte's [2024 Gen Z and Millennial Survey](#). "But there will also likely be a need for organizations to supplement higher education with learning and development opportunities, particularly as emerging technologies make lifelong learning even more essential." An employer that provides continuing education and career development opportunities is more attractive to a Gen Z worker.

## What Gen Z values in a job

To foster a workplace where members of Gen Z want to stay and do their best work, it's imperative to incorporate the things they care deeply about. They prioritize environmental sustainability, a diverse and open company culture, a keen sense of purpose, and technology and tools that can help them focus on the things they value.

### A sense of purpose

Gen Z would prefer to use their full-time jobs to make an impact on the world, ideally contributing something meaningful to society in some way.



"This is far from an uncommon sentiment among Gen Z professionals," said Zachary Stoner, an accounting professional with Dark Horse CPAs. "More than ever, we are seeking careers where we can make a tangible impact, and have the opportunity to pursue projects with guidance, not just become another cog in the machine."

According to Deloitte's survey, roughly 86% of Gen Zers say having a sense of purpose in their work is important to their overall job satisfaction and well-being. In fact, members of Gen Z are increasingly likely to turn down an assignment or an employer who *doesn't* align with their values. The survey found that 50% of Gen Zers have rejected an assignment or project based on their personal ethics or beliefs, while as many as 44% have turned down a job altogether.

Some common reasons for these rejections? Negative environmental impact, non-inclusive practices that contributed to inequality, and lack of support for employees' mental well-being.

The takeaway is simple: Employers first need to set a clear purpose and vision for their work, but they also need to actively listen to their employees to make sure everyone is aligned on values. The result is an organization with more motivated, engaged, and loyal employees, Gen Z or otherwise.





## Work-life balance

Believe it or not, some organizations are still having the work-life conversation. For past generations, work-life balance may have been considered a “nice to have” quality in a job, but for Gen Z, it’s non-negotiable. Flexibility and balance are at the top of the list for younger job seekers, as is prioritizing [mental health and well-being](#).

“By prioritizing mental health and well-being in the workplace, employers may not solve all employee mental health challenges, but they can significantly reduce workplace-related stress,” said Stoner. “And from the employers’ perspective, I believe anyone who has managed people before recognizes the fact that happy and healthy employees will drastically outperform those who are unhappy.”

## Tools and technology to make their jobs easier

If there’s one thing Gen Z excels in, it’s an open-mind to innovation. These digital natives celebrate new [tools and technology that eliminate low-value work](#), such as data entry, report generation, file organization, and routine client communications. Gen Z seeks meaning and purpose from their jobs, so spending hours on data entry, for example, directly opposes that.

“Having an existing smooth automation and workflow, or at the minimum a general architecture, is extremely important,” said Stoner. “In 2025, there is almost no reason repetitive tasks should not be automated in some way. Without this, employees can be stuck doing time-intensive work while gaining no real knowledge. We live in a pretty incredible era where mundane, repetitive tasks can and should be automated, leaving more time doing analytical work and less time data shuffling.”

## Freedom from the anxiety that generative AI will take their jobs

Generally, younger workers feel excitement about the ways generative AI (GenAI) can eliminate rote work, freeing up time to focus on clients and contributing to work-life balance. However, there remains concern that GenAI could eliminate certain jobs, or make it harder for younger generations to enter the workforce, according to Deloitte's report. Ideally, Gen Z would love to not worry about GenAI taking their jobs in some way. To combat this, they're thinking about what job opportunities and tasks are less vulnerable to automation.

### 3 steps you can take today to create a better workplace for Gen Z:

- ✓ Reassess your firm's mission to align with Gen Z values.
- ✓ Audit your firm's technology stack for outdated manual tasks.
- ✓ Implement or expand mental health benefits and flexible scheduling options.

## How to retain Gen Z accountants for the long term

Keeping members of Gen Z happy at your firm for the long term is pretty simple! You're not reinventing the wheel, and no extreme measures need to be taken. Instead, you need only to prioritize investing in your people.

### 1. Offer higher pay

The first step toward retaining your staff? Offer higher pay with job security. Employees feel valued when they're being compensated fairly and aren't continuously worried about layoffs or dips in engagements. This strategy should be prioritized before all the others, because financial security is a wide-reaching concern for younger workers. About 30% of Gen Z feels financially insecure, according to Deloitte's survey, and more than half of that group lives paycheck-to-paycheck. Uncertainty around the country's economy only exacerbates these concerns. Having stable, livable pay can help ease worries both on the job and outside of it.

### 2. Establish flexible work environments

A driving force behind work-life balance is flexibility where employees can work. Return-to-office mandates, for example, have netted mixed results. In the Deloitte study, some Gen Zers report improved engagement and connection, while others note experiencing decreased productivity and increased stress. Allowing employees to work in ways that make sense with their work styles and lifestyles can go a long way in granting the balance they seek.



### 3. Give the firm a mission

To authentically feel a sense of purpose in their work, Gen Zers seek out workplaces with a mission. Younger workers feel they can drive the most change on societal challenges like climate change; diversity, equity, and inclusion; and mental health.

Accounting students at Oregon State University, for example, have made it a point to join Volunteer Income Tax Assistance (VITA) programs, where they help individuals file their tax returns for free.

"Gen Zers ... are increasingly viewing accounting not as a monotonous chore but as a way to completely transform people's lives," according to reporter Preston Fore for *Fortune*. "Their actions are already helping save Americans millions of dollars through free tax help through a partnership with the IRS and close to two dozen universities."

By making a difference in lives through the work done at your firm, you can attract and maintain Gen Z accountants who want to make an impact.

### 4. Invest in people first

It may be tempting to earmark large portions of your budget for marketing, sales, or technology, but the priority should be investing in people: your employees and your clients.



"When you're thinking about creating a workplace that attracts and retains Gen Z—and Gen Alpha at some point—you're thinking beyond just the end-client your business serves," said Chase Birky, CPA, and co-founder of Dark Horse CPAs. "You're thinking about how to best take care of your people so that they can best take care of your clients. If every level of an organization is focused on serving the people they lead, I can assure you that clients will feel this in a way that spurs word-of-mouth growth."



### 3 quick wins for your firm:

- ✓ Benchmark your compensation plan against industry standards.
- ✓ Survey employees on work environment preferences (in-office vs. remote).
- ✓ Identify opportunities for your team to engage in meaningful community work.

## The 5 things one Gen Zer looks for in an employer

For Zachary Stoner, finding the right job out of school meant seeking out a firm that actively listened to its employees and adapted to their strengths. Here are the five things he says he looks for in an employer; it is almost guaranteed that any Gen Z values the same things.

1. **Market sentiment:** When considering potential employers, especially those providing a service, I try to gauge overall sentiment from customers and employees, both current and former.
2. **Open-mindedness toward innovation:** In a tech-centric world, the willingness of an employer to adopt new technology is extremely important to me. Personally, I love staying on top of new tech developments and following trends in technology adoption. I also believe that, if possible, staying with the same company for many years allows for a deeper understanding of the business and business systems. Working for a company that allows me to try out the latest tech with a willingness to adopt it (when such adoption is beneficial) is extremely important to me, provides value to the company, and often is quite fun!
3. **Investment in employees:** People far smarter than me have repeated over and over that “a business is made by its employees.” I’m a firm believer in this statement. While many companies claim to value their employees, the real truth is shown by how much they invest in career development and education. I and many others want to work for an employer who backs those words with action.

4. **Recognition of work:** The harsh reality of any career is that you'll be spending a large portion of your life working. If you have any pride in your work, then you'll be working hard. Genuine recognition for the work you put in inspires a sense of belonging and motivation to continue to grow.
  5. **Flexibility and balance:** Work is a large portion of life, but by no means should it consume life entirely. I value flexibility in where and how I work, and I appreciate a mutual understanding from me and my employer that the "current project," while important, is far from a top priority in the overall scope of my life.
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## How ProConnect Tax can help keep Gen Z on board

Advances in technology can make the accounting profession more rewarding for Gen Z by helping accounting professionals focus on tasks with value and meaning. Accountants have outsourced many routine and repeatable tasks to software powered by AI, which allows them to shift their focus to strategy and decision-making. One such solution is Intuit ProConnect Tax.

This cloud-based professional tax software allows you to create tax returns in minutes, from anywhere you are. [ProConnect Tax](#) streamlines workflows, eliminates manual data entry errors, and saves time by creating efficiencies that are truly timesaving. As an Intuit product, ProConnect Tax seamlessly integrates with [QuickBooks Online Accountant](#), the go-to software when working with a business owner's books.

One of the newest features built into ProConnect Tax is [Intuit Tax Advisor](#), an integrated advisory tool that automatically generates strategies for client tax savings. Intuit Tax Advisor is the only tax software that combines QuickBooks Online Accountant and Intuit Tax Advisor for maximum productivity and exceptional results.



The importance of access to cloud automation is vitally important, in my opinion. Reducing the overly repetitive workload on employees keeps their minds focused on more high-level tasks. The option of hosting these automation tasks in the cloud makes them nearly infinitely scalable.

– Zachary Stoner, Dark Horse CPAs



## Notable features

Much like technology, tax rules can change in an instant. In order to help keep you and your clients in the know, Intuit used client feedback to develop smart features, including the following:

- **IRS transcript direct access:** You can pull all of your client's transcripts directly from the IRS into ProConnect Tax; complete tax returns faster and more accurately with less client back-and-forth tasking.
- **Flags:** Tax preparers can flag missing data, estimates, and fields needing review within ProConnect Tax. Flagged items can be reviewed by clients and accounting professionals in an input drawer, which also houses imported documents, autofills tax document fields, and marks them for review.
- **Customized client letters:** Instead of typing emails manually to notify clients of flags, your firm can send templated letters with preset and customized tax return data fields.
- **1040 import:** Generate a tax summary comparison for the current tax year by creating a new client and using the relevant information from their previous year's 1040 form.
- **Seamless data conversion:** Intuit's Easy Start team of onboarding experts help customers just like you. They'll walk you through the process to ensure your clients' data is converted accurately.

Intuitive tools embedded in ProConnect Tax are among the integrations that save users money, time, and energy:

- **Intuit Link:** Enjoy a cloud-hosted portal that gathers and manages clients' tax documents and data. With [Intuit Link](#), instead of chasing clients for information, you can send them an email link request. Set up automated email reminders every seven days to log into the Link client portal and upload documents.
- **Electronic signature:** Intuit [eSignature](#) provides a quick and convenient way to request signatures. Rather than chasing down clients to sign in ink or using a third-party tool to request signatures, eSignature cuts to the chase to collect client signatures digitally and quickly.
- **Protection Plus:** With [Protection Plus](#), receive access to a dedicated team of experts who can handle tax notices and audits.



## Conclusion

At a time when many accounting professionals are retiring or leaving the profession entirely, it's crucial to appeal to Gen Z. This group has entered the workforce after periods of economic and cultural instability, directly informing the approach to their careers. Taking time to understand their values and unique strengths can help create an environment they'd like to be a part of.

Building a Gen Z-friendly workplace requires reexamining compensation standards, work environment flexibility, and your firm's mission. That's because Gen Z workers prioritize stability, having a sense of purpose, and flexibility in their work. Plus, investing in employee development can, in turn, make your clients feel heard and cared for. By outlining how your firm makes an impact, you can create a workplace where members of Gen Z will thrive for years to come.

As a cloud-based professional tax software, ProConnect Tax modernizes your workflows by taking care of tedious, low-value tasks. Whether your firm has one user or 1,000 users, custom pricing options cover all firms with tax return bundles of every size. Ready to see ProConnect in action? Schedule a demo or call **844-818-5406** to speak with a tax software specialist today.