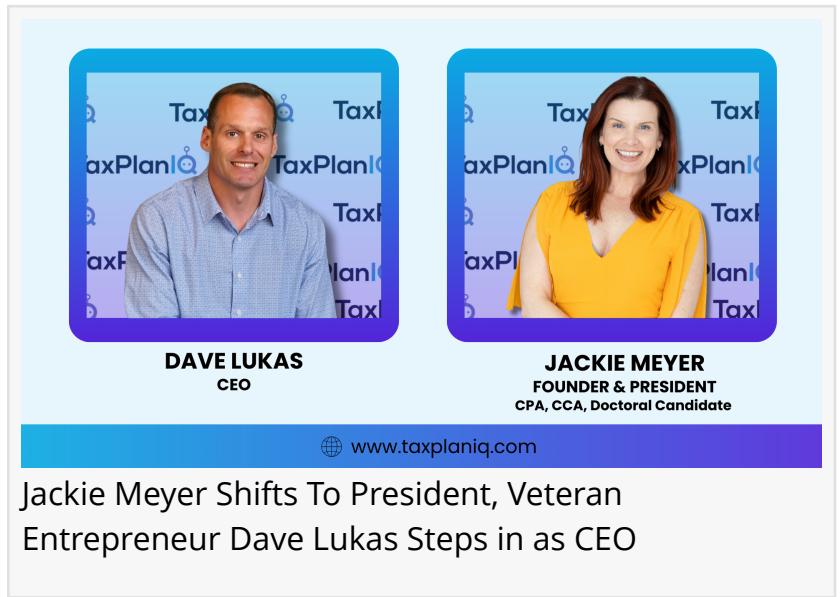


TaxPlanIQ Announces Ambitious Expansion Plans with Leadership Evolution

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Jackie Meyer Shifts To President, Veteran Entrepreneur Dave Lukas Steps in as CEO

SOUTHLAKE, TX, USA, January 9, 2024 /EINPresswire.com/ -- Following TaxPlanIQ's stellar third year, marked by accolades such as winning AICPA Accelerator of the Year and earning the prestigious title of runner-up for the CPA Practice Advisors Tech Innovation Award, Visionary Founder Jackie Meyer, CPA, is transitioning into a full-time thought leadership role.



This strategic move aligns with her commitment to promoting peaceful entrepreneurship through keynotes, an upcoming book, and contributions to Forbes. Simultaneously, Jackie is pursuing her doctorate in strategic leadership and coaching, with an anticipated completion date in 2024. This leadership shift sets the stage for TaxPlanIQ's next phase of exponential growth, with seasoned entrepreneur Dave Lukas stepping in as the new CEO to drive ambitious expansion plans.

“

Leading TaxPlanIQ has been an incredible journey. I'm now eager to focus on fostering peaceful entrepreneurship...while also spending more time with my family.”

Jackie Meyer

Under Jackie Meyer's guidance as CEO, TaxPlanIQ achieved remarkable milestones in the accounting technology space. Reflecting on her tenure, Jackie stated, “Leading TaxPlanIQ has been an incredible journey, a true blessing.

I'm now eager to focus on fostering peaceful entrepreneurship, advocating for work-life harmony and mental wellness—topics I'm deeply passionate about—while also spending more time with my family.”

Dave Lukas, a six-time INC 5000 entrepreneur, emerges from semi-retirement and strategic

consulting to seize this special opportunity. His expertise and innovative approach position him as a key driver of TaxPlanIQ's significant growth. "I am thrilled to join the team at TaxPlanIQ and work alongside a visionary like Jackie," said Lukas. "TaxPlanIQ has built a strong foundation with an excellent team, and I am excited to play a part in its continued success. The sky is truly the limit for its potential."

In Q4, TaxPlanIQ introduced several groundbreaking innovations, including full integration with JAlne, OCR technology, and suggested tax strategies. Additionally, Joli Rosario has been promoted to the role of COO and integrator, ensuring the company is well-prepared to navigate continued growth and meet the evolving demands of the industry. With these strategic moves, TaxPlanIQ remains at the forefront of innovation, poised for continued success in the dynamic landscape of accounting technology.

For more information about TaxPlanIQ and its innovative solutions, please visit <https://www.taxplaniq.com>.

About TaxPlanIQ

TaxPlanIQ, founded by Jackie Meyer, is dedicated to revolutionizing tax planning. Its mission is to empower accountants with innovative software that visualizes savings and showcases their value to clients. The service offers a comprehensive solution for effective tax strategy and client management, enhancing the accountant-client relationship.

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