

Swanson Reed Upgrades Award-Winning TaxTrex.ai with Autonomous AI Agents and Accounting Software Integration

Swanson Reed upgrades TaxTrex.ai with autonomous AI agents and accounting software integration, helping businesses build audit-ready R&D tax claims faster.

JACKSONVILLE, FL, UNITED STATES,

September 18, 2026 /

EINPresswire.com/ -- Swanson Reed, one of the world's largest specialist [R&D tax advisory firms](#), today announced a major upgrade to TaxTrex.ai, its award-winning [R&D tax credit](#) substantiation platform.



The release adds upgraded autonomous AI agents and direct [accounting software](#) integration, giving businesses, CPAs, and tax preparers a faster path to audit-ready claims at a moment when tax authorities are demanding more. The IRS is challenging R&D claims more aggressively than ever, and claims built on after-the-fact estimates are the most exposed.

“

With IRS scrutiny high, retroactive estimation is a risk. TaxTrex.ai uses autonomous AI and accounting sync to capture real-time evidence for a faster, foolproof path to audit-ready R&D claims.”

*Cherie Jones, Managing
Director of Operations at
Swanson Reed*

TaxTrex.ai answers that pressure with a prospective approach: it captures contemporaneous evidence as projects happen, rather than reconstructing it at filing time. First launched in 2015, honored with a Fintech Award for accounting innovation in 2018, and rebuilt as an AI-powered platform in 2025, it remains the only R&D tax credit substantiation platform backed by published, peer-reviewed research. The platform has supported claimants in the United States, Canada, the United Kingdom, Ireland, Australia, New Zealand, and Singapore since 2017.

What's New and What Sets It Apart

- Audit defense built on real-time evidence. Documentation is captured as the work happens, eliminating retroactive guesswork and establishing a defensible record before an audit ever begins.

- Upgraded autonomous AI agents. The agents analyze project documentation, extract contemporaneous evidence, and run real-time risk assessments on every claim.

- Direct accounting software integration. TaxTrex.ai now syncs financial records automatically from leading accounting platforms, tying qualified payroll, contractor, and supply expenses directly to R&D activities.

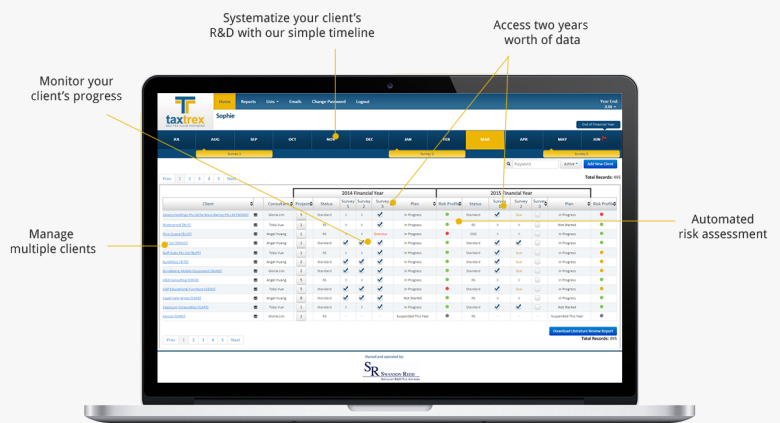
- A global compliance engine. One platform handles the distinct documentation standards of seven jurisdictions across North America, Europe, and Asia-Pacific.

- A peer-reviewed research foundation. Technical narratives are generated from empirical, peer-reviewed academic methodology, meeting tax authority standards worldwide.

- A decade of proven technology. The platform builds on eleven years of development and testing across thousands of claimants and their CPAs.

The TaxTrex.ai Advantage

"When we launched the original TaxTrex in 2015, our goal was to connect the R&D tax adviser, the claimant, and their CPA so that compliance stopped falling through the cracks," said Cherie Jones, Managing Director of Operations at Swanson Reed. "Eleven years and thousands of claims later, the environment has changed. The IRS is targeting R&D claims harder and demanding far



more detail, and it regularly challenges anything built on estimation after the fact."

"Our prospective approach solves that by capturing the evidence authorities want in real time," Jones added. "With direct accounting software integration and advanced AI agents, clients can now compile defensible claims in minutes on a platform no competitor can match, because no competitor is backed by peer-reviewed research."

About Swanson Reed

Swanson Reed was founded in 1984 as Reed & Co. by Joe William Norris. Today it is one of the largest specialist R&D tax advisory firms in the world, employing more than 60 people and securing over \$1 billion in R&D tax credits for its clients. The firm operates offices in the United States, Canada, the United Kingdom, Ireland, Australia, New Zealand, Italy, and Singapore, and brings more than 40 years of experience to helping innovative companies maximize R&D tax incentives. Swanson Reed prepares R&D tax credit claims exclusively, giving businesses precision, support, and audit protection that generalist firms cannot match.

Media Contacts

Cherie Jones

Managing Director of Operations, Swanson Reed | Specialist R&D Tax Advisors

clj@swansonreed.com | 512.333.2076

<https://www.swansonreed.com/services/research-tax-credit-software/>

Cameron Ratcliffe

Manager, TaxTrex | R&D Tax Credit Software

hello@taxtrex.ai | 817.730.9726

<https://taxtrex.ai/>

Adam Rogers

Swanson Reed | Specialist R&D Tax Advisors

+1 817-769-8168

[email us here](#)

Visit us on social media:

[LinkedIn](#)

[Facebook](#)

[YouTube](#)

[X](#)

This press release can be viewed online at: <https://www.einpresswire.com/article/943271753>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable

in today's world. Please see our Editorial Guidelines for more information.

© 1995-2026 Newsmatics Inc. All Right Reserved.