

NOVATAX

EASY
STEP BY STEP

**QUICK
START GUIDE**

AI-POWERED.
INTUITIVE.
AFFORDABLE.

WWW.NOVATAXINTELLIGENCE.COM

May 2026

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TAX ADVISOR AI

Tax Advisor AI is a powerful, **generative AI solution**—designed to help tax pros work faster, make confident decisions backed by authoritative sources, and communicate more effectively. Expect:

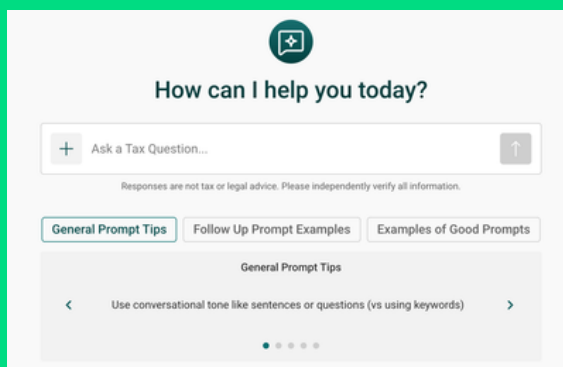
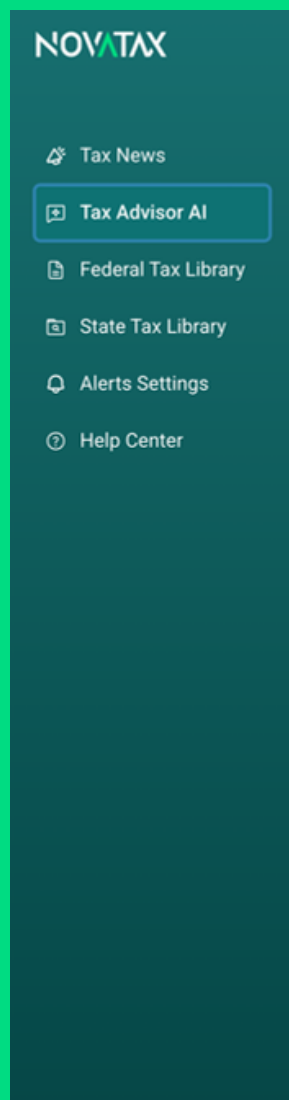
- ✓ Fast answers to tax questions using **plain-English queries**—no specialized search skills required
 - Sample prompts and prompt tips provided
 - Search government and expert sources—or refine to government-only
- ✓ Clear, **easy-to-understand analysis** from authoritative sources, like:
 - Federal, State, and local government sites
 - Expert commentary from law firms, CPA firms, and other industry sites
- ✓ Defensible answers with **source links** for quick oversight and verification
 - Link to AI-generated sources, sorted by Government and Secondary Analysis, or verify with additional Government sources and analysis
- ✓ Reliable answers that can be quickly converted to **client communications**
- ✓ **Streamlined research and communication workflows** for smoother, faster decision-making and client engagement

What do we recommend?

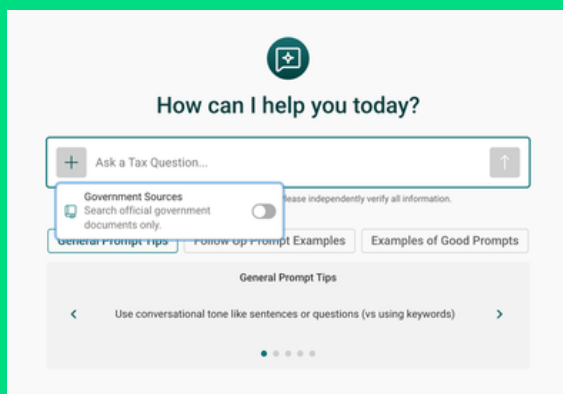
- Use [Tax Advisor AI](#) to summarize complex tax law, draft client-facing explanations, and synthesize broad concepts. Reserve traditional tax research for drilling down into primary sources, verifying citations, and finalizing conclusions where absolute authority is required.

TAX ADVISOR AI

Product Features

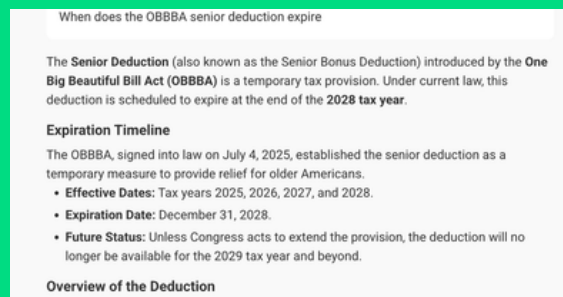


← Plain-English Query



← Narrow Search Sources

← Prompt Examples & Tips



← Fast, Clear Response

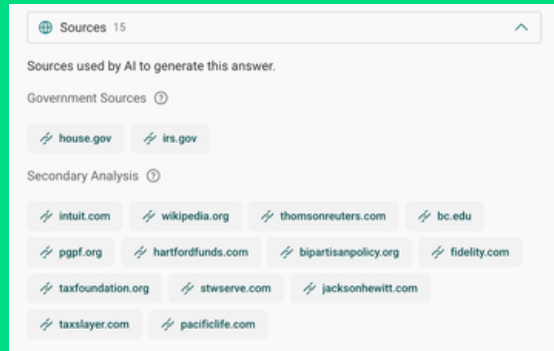
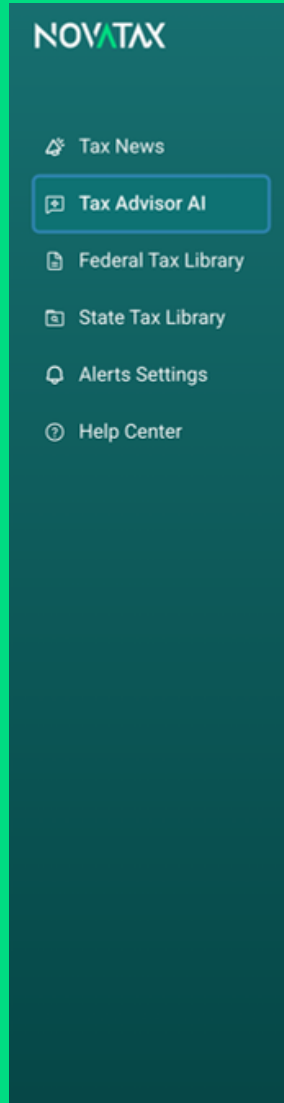
What do we recommend?

- Before beginning your research, take a quick look at our prompt tips and examples.

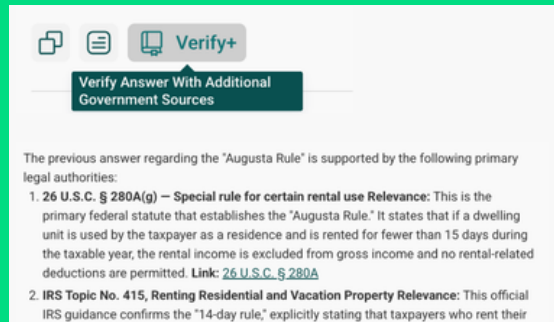
TIP! Turn on “**Government Sources**” when you want answers from primary and secondary law sources only.

TAX ADVISOR AI

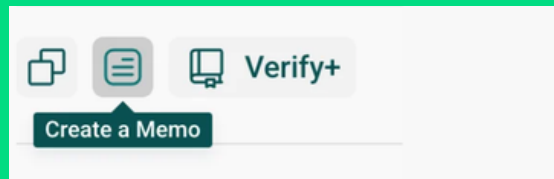
Product Features



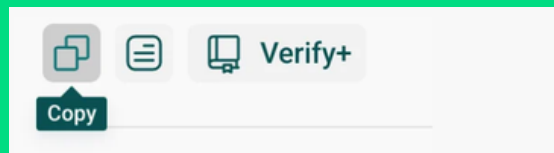
← Authoritative Source Links—Sorted by **Government Sources** and **Secondary Analysis**



← **Verify** Against Additional Government Sources



← One Click Generates Customizable Client Memo



← One Click Copies Response

What do we recommend?

- Drill down into trusted **Government Sources** and **Secondary Analysis** and use **Verify+** to tap into additional **Government Sources** and expert insights beyond standard GenAI responses.

TIP! Easily create engaging communications—for internal and external use—with the **“Create a Memo”** and **“Copy”** features.

FEDERAL TAX RESEARCH LIBRARY

Our comprehensive Federal Tax Research Library consists of **300,000+** Federal law documents, including the Code, Regulations, Rulings, Memorandums, Notices, Announcements, Court Cases, Quick Reference Tables, and more!

NOVATAX

Federal Tax Library

Research an Issue [Find by Citation](#)

Select a document type

CODE/REGULATIONS

- Internal Revenue Code of 1986
- Final and Temporary Regulations
- Proposed Regulations
- Public Laws
- Treasury Decisions

IRS RULINGS

- Letter Rulings and other Advice
- General Council Memorandums

OTHER DOCUMENT TYPES

- Court Cases
- Archives Code and Regs (previous 5 tax years)
- Quick Reference Tables

Reference Tables

Tax Tables	Standard Deduction
Interest on Underpayments and Overpayments	Dependent Care Credit
Applicable Federal Rates	Adoption Credit
Automobile Expenses: Standard Mileage Rates	Qualified Transportation Fringe
Automobile Depreciation & Leasing	Per Diem Rates
Regulatory Agenda, Department of the Treasury	Fringe Benefits: SIFL Rates
Annual Inflation-Adjusted Amounts	Depreciation: Business & Income-Producing Property
Kiddie Tax	Cost-of-Living Adjustments (COLA) On Qualified Retirement Plans
Earned Income Tax Credit	OASDI Wage Base

Select a Court

- Supreme Court
- Courts of Appeals
- District Courts
- Court of Federal Claims
- Tax Court
- Board of Tax Appeals
- Bankruptcy Courts (Tax Related Cases)

Publications

Announcements

Actions on Decisions

Notices

Premium content, updated daily!

Under “Other Document Types” you can find a complete listing of:

- Tax-related court cases by clicking on “Court Cases”.
- Quick Reference Tables that provide easy access to dozens of tax tables, credits, deductions, rates, plus more.

FEDERAL TAX RESEARCH LIBRARY

Each document in our Federal Tax Research Library is enhanced by **Tax Analysts®** experts with unique features that allow you to quickly determine those documents that address your specific issue.

- A concise **Headline** highlights the document's main topic.
- A **Summary** provides an expert overview of the document's primary points.
- Documents are editorially classified by **Tax Topics** and key **Code Sections**.

NOVATAX Federal Tax Library

IRS Issues 2026 List of Changes in Plan Qualification Requirements

NOTICE 2026-34 2026-23 IRB 1 NOTICES

MAY 13, 2026

Summary

The IRS has issued (Notice 2026-34) the 2026 cumulative list of changes in qualification requirements for defined contribution qualified preapproved plans, identifying the changes the agency will consider regarding the form of a plan submitted for the fourth remedial amendment cycle that were not considered during the first three cycles.

The IRS will review a defined contribution qualified preapproved plan document that is submitted for Cycle 4 only for the changes listed in the notice. The Cycle 4 submission period begins August 1, 2026, and ends July 31, 2027.

2026 Cumulative List of Changes in Plan Qualification Requirements for Defined Benefit Qualified Pre-approved Plans

Document Classification

Tax Topics

Benefits and pensions

Code Sections

Sec. 401 Qualified pension, profit-sharing, and stock bonus plans

Sec. 402 Taxability of beneficiary of employees' trust

Sec. 402A Optional treatment of elective deferrals as Roth contributions

Sec. 411 Minimum vesting standards

Sec. 417 Definitions and special rules for purposes of minimum survivor annuity requirements

Sec. 414 Definitions and special rules

Premium content, updated daily!

A document's Headline, Summary, and Document Classification (Tax Topics, Code Sections) allow you to quickly identify the documents that address your specific issue.

FEDERAL TAX RESEARCH LIBRARY

Easily find the documents you need with our proprietary AI-assisted search technology - you can **“Research an Issue”** or **“Find by Citation”**.

Premium content, updated daily!

To Research an Issue:

- Enter your keyword or phrase and/or use one or more Filters to narrow your search, as explained in more detail below. NovaTax quickly retrieves and ranks all relevant documents.

To Find a Document:

- Select the document type, enter the document number, citation, or party name (for cases), and select your document.

*TIP! Use **“Find by Citation”** when you know the document you need. Use **“Research an Issue”** when you don't know the document name or citation and/or you want to retrieve a broader set of documents.*

AI-ASSISTED RANKING (BEST MATCH)

Once you input your keywords and/or Filter selections, NovaTax uses AI technology to rank documents based on relevancy. The documents most likely to be relevant appear at the top of your Results list.

The screenshot displays the NovaTax Federal Tax Library interface. On the left is a dark sidebar with navigation options: Tax News, Tax Advisor AI, Federal Tax Library (highlighted), State Tax Library, Alerts Settings, and Help Center. The main content area is titled 'Federal Tax Library' and includes a search bar with the query '2026 changes in plan qualification'. Below the search bar, a dropdown menu is open, showing 'Best Match' selected with a radio button and 'Reverse Chronological' as an alternative. A red arrow points to the 'Best Match' option. To the right of the search results is a 'Filters' panel with options for Document Types, Tax Topics, Code Sections, and Date Range. The search results list two items: 'IRS Issues 2025 Required Amendments Plans' (dated December 3, 2025) and 'IRS Issues 2026 List of Changes in Plan Qualification Requirements' (dated May 13, 2026). The first result is highlighted, and its text is visible: 'The IRS has issued guidance (Notice 2025-60) providing the 2025 required amendments list for individually designed plans qualified under section 401(a) and individually designed plans that satisfy the requirements of section 403(b).'

Research made simple!

Leverage the power of AI-Assisted Ranking:

- NovaTax's "Best Match" feature retrieves and ranks your documents, starting with the most relevant, based on how many times your keyword occurs, how close the occurrences are, and where they are in the document - like Google.
- You can also sort documents in reverse chronological order.

FILTERS

CODE SECTIONS

Every document in the Federal Tax Library and Federal Tax News is enhanced by **Tax Analysts®** experts to include unique and powerful search Filters like Code Section, Tax Topics, and Document Type - to help you quickly locate the documents and answers you need.

If you have narrowed your research to a Code Section - you can quickly retrieve only those documents with that Code Section at issue.

The screenshot shows the NOVATAX Federal Tax Library interface. On the left is a navigation menu with options like Tax News, Tax Advisor AI, Federal Tax Library (highlighted), State Tax Library, Alerts Settings, and Help Center. The main area is titled 'Federal Tax Library' and includes a search bar with the placeholder 'Enter keywords, then use filters if needed'. Below the search bar, there are search results for 'Results (25)'. The first result is 'Sec. 31.3134-1 Recapture of credits.' with a sub-label 'FINAL AND TEMPORARY REGULATIONS' and a date of 'JULY 24, 2023'. The second result is 'Sec. 31.3134-1T Recapture of credits.' with a sub-label 'FINAL AND TEMPORARY REGULATIONS' and a date of 'SEPTEMBER 9, 2021'. The third result is 'District Court Affirms IRS's ERC Setoff Against Bankruptcy Claim' with sub-labels 'GRILL CONCEPTS INC. V. UNITED STATES' and 'UNITED STATES DISTRICT COURT FOR THE CENTRAL DISTRICT OF CALIFORNIA' and a date of 'MARCH 29, 2026'. On the right side, there is a 'Filters' panel with a 'Clear All' link. The 'Code Sections' filter is expanded, showing a search box with 'Sec. 3134' entered and a checked box for 'Sec. 3134 Employee retention credit for employers subject to closure due to COVID-19'. A green arrow points to the 'Code Sections' filter, and another green arrow points to the search results.

Filter by Code Sections!

Code Section filtering is an easy way to find the documents you need!

- Click on the “Code Sections” filter on the right panel.
- Type in your main Code Section number.
- Click the box for the Code Section you want - you've instantly narrowed 300,000+ documents to just those with your Code Section at issue.

FILTERS

TAX TOPICS

The screenshot displays the NovaTax Federal Tax Library interface. On the left is a navigation sidebar with options like Tax News, Tax Advisor AI, Federal Tax Library, State Tax Library, Alerts Settings, and Help Center. The main content area shows a search bar with the text 'Enter keywords, then use filters if needed' and a search button. Below the search bar, it indicates 'Results (41)' and displays a search result for 'IRS Extends Temporary Relief From Digital Asset Identification Regs' dated March 17, 2026. To the right of the search results is a 'Filters' panel with sections for Document Types, Tax Topics, Code Sections, and Date Range. A green arrow points to the 'Tax Topics' filter, which is currently set to 'Cryptocurrency'. Below the search results, a detailed 'Selected Filters' table is shown, listing various tax topics with checkboxes. The 'Cryptocurrency' filter is selected under the 'FINANCIAL PRODUCTS AND BANKING' category. A green arrow points to the 'Cryptocurrency' filter in the 'Selected Filters' table. At the bottom right of the filter table, there is a 'Filter by the Tax Topics at issue!' callout.

Federal Tax Library

Research an Issue Find by Citation

Enter keywords, then use filters if needed

Results (41)

IRS Extends Temporary Relief From Digital Asset Identification Regs

NOTICE 2026-20 2026-15 IRB 800 NOTICES

MARCH 17, 2026

The IRS has extended (Notice 2026-20) until December 31, 2026, temporary relief (Notice 2025-7) for taxpayers who sell, dispose of, or transfer digital assets, allowing them to use additional methods for making adequate

Filters Clear All

Document Types Select

Tax Topics Select

Code Sections

Date Range

Selected Filters

Tax Topics

Cryptocurrency

Filter by the Tax Topics at issue!

Category	Item	Selected
Tax technology	Tax technology	<input type="checkbox"/>
TAXPAYER TYPES	TAXPAYER TYPES	<input type="checkbox"/>
Cooperatives taxation	Cooperatives taxation	<input type="checkbox"/>
Corporate taxation	Corporate taxation	<input type="checkbox"/>
Domestic relations and divorce	Domestic relations and divorce	<input type="checkbox"/>
Exempt organizations	Exempt organizations	<input type="checkbox"/>
Farm and ranch taxation	Farm and ranch taxation	<input type="checkbox"/>
Financial institutions	Financial institutions	<input type="checkbox"/>
Individual income taxation	Individual income taxation	<input type="checkbox"/>
Limited liability companies	Limited liability companies	<input type="checkbox"/>
Marketplace facilitators	Marketplace facilitators	<input type="checkbox"/>
Native American (Indian) taxation	Native American (Indian) taxation	<input type="checkbox"/>
Nonresident taxation	Nonresident taxation	<input type="checkbox"/>
Partnerships	Partnerships	<input type="checkbox"/>
RICs, REITs, and REMICs	RICs, REITs, and REMICs	<input type="checkbox"/>
Subchapter S corporations	Subchapter S corporations	<input type="checkbox"/>
Trusts and estates taxation	Trusts and estates taxation	<input type="checkbox"/>
BANKRUPTCY AND INSOLVENCY	BANKRUPTCY AND INSOLVENCY	<input type="checkbox"/>
EMPLOYMENT TAXES	EMPLOYMENT TAXES	<input type="checkbox"/>
Employment tax-related penalties	Employment tax-related penalties	<input type="checkbox"/>
Employment taxes	Employment taxes	<input type="checkbox"/>
FICA and SECA	FICA and SECA	<input type="checkbox"/>
FUTA	FUTA	<input type="checkbox"/>
Withholding	Withholding	<input type="checkbox"/>
Worker classification	Worker classification	<input type="checkbox"/>
FINANCIAL PRODUCTS AND BANKING	FINANCIAL PRODUCTS AND BANKING	<input checked="" type="checkbox"/>
Cryptocurrency	Cryptocurrency	<input checked="" type="checkbox"/>
Net investment income tax	Net investment income tax	<input type="checkbox"/>
Personal holding companies	Personal holding companies	<input type="checkbox"/>
INSURANCE	INSURANCE	<input type="checkbox"/>
INTERNATIONAL TAXATION	INTERNATIONAL TAXATION	<input type="checkbox"/>
Base erosion and antiabuse tax (BEAT)	Base erosion and antiabuse tax (BEAT)	<input type="checkbox"/>
Base erosion and profit shifting (BEPS)	Base erosion and profit shifting (BEPS)	<input type="checkbox"/>
Common reporting standard (CRS)	Common reporting standard (CRS)	<input type="checkbox"/>
Controlled foreign corporations (CFCs)	Controlled foreign corporations (CFCs)	<input type="checkbox"/>
Cross-border mergers and acquisitions	Cross-border mergers and acquisitions	<input type="checkbox"/>
Currency transactions and issues	Currency transactions and issues	<input type="checkbox"/>
Domestic international sales corporations	Domestic international sales corporations	<input type="checkbox"/>
Expatriate taxation	Expatriate taxation	<input type="checkbox"/>
FATCA	FATCA	<input type="checkbox"/>
Foreign tax credit	Foreign tax credit	<input type="checkbox"/>
Foreign-source income	Foreign-source income	<input type="checkbox"/>
Global intangible low-taxed income (GILTI)	Global intangible low-taxed income (GILTI)	<input type="checkbox"/>
Information exchange	Information exchange	<input type="checkbox"/>
International taxation	International taxation	<input type="checkbox"/>
Nonresident taxation	Nonresident taxation	<input type="checkbox"/>
Passive foreign investment companies (PFICs)	Passive foreign investment companies (PFICs)	<input type="checkbox"/>
Permanent establishment	Permanent establishment	<input type="checkbox"/>
Residency	Residency	<input type="checkbox"/>
Trade	Trade	<input type="checkbox"/>
Transfer pricing	Transfer pricing	<input type="checkbox"/>
Treaties	Treaties	<input type="checkbox"/>
Withholding	Withholding	<input type="checkbox"/>
Exempt organizations	Exempt organizations	<input type="checkbox"/>
Exemption applications	Exemption applications	<input type="checkbox"/>
Hospitals	Hospitals	<input type="checkbox"/>
Political organizations	Political organizations	<input type="checkbox"/>
Private foundations	Private foundations	<input type="checkbox"/>
Tax-exempt bonds	Tax-exempt bonds	<input type="checkbox"/>
Unrelated trade or business	Unrelated trade or business	<input type="checkbox"/>
SALES AND EXCHANGES	SALES AND EXCHANGES	<input type="checkbox"/>
Basis	Basis	<input type="checkbox"/>
Gains and losses	Gains and losses	<input type="checkbox"/>
Like-kind exchanges	Like-kind exchanges	<input type="checkbox"/>
Sales and exchanges	Sales and exchanges	<input type="checkbox"/>
TAX CUTS AND JOBS ACT	TAX CUTS AND JOBS ACT	<input type="checkbox"/>
TAX POLICY	TAX POLICY	<input type="checkbox"/>
Amnesties	Amnesties	<input type="checkbox"/>
Budgets	Budgets	<input type="checkbox"/>
Digital economy	Digital economy	<input type="checkbox"/>
Federal and state conformity	Federal and state conformity	<input type="checkbox"/>
Fundamental tax system structure	Fundamental tax system structure	<input type="checkbox"/>
Politics of taxation	Politics of taxation	<input type="checkbox"/>
Social welfare taxation	Social welfare taxation	<input type="checkbox"/>
Tax history	Tax history	<input type="checkbox"/>
Tax policy	Tax policy	<input type="checkbox"/>
Tax reform	Tax reform	<input type="checkbox"/>
Tax system administration	Tax system administration	<input type="checkbox"/>
Transparency	Transparency	<input type="checkbox"/>

It's easy to find relevant materials using the Tax Topics filter!

- Click on "Tax Topics" and select from among the extensive table of Tax Topics to narrow down your search.
- Click "Apply Filter" and NovaTax quickly retrieves documents discussing your tax topic.

TIP! You can press CTRL+F to keyword search for a topic name within the Tax Topics table.

STATE TAX RESEARCH LIBRARY

Our State Tax Research Library gives you access to the Tax Codes & Regulations of all 50 States and D.C. plus access to State Tax Audit Manuals of 40+ States and D.C.!

The screenshot displays the NOVATAX State Tax Library interface. On the left is a dark sidebar with the NOVATAX logo and navigation links: Tax News, Tax Advisor AI, Federal Tax Library, State Tax Library (highlighted), Alerts Settings, and Help Center. The main content area is titled 'State Tax Library' and includes a 'States' section with a list of states from Alabama to Wyoming. A search bar is present with the text 'Search in the selected Code' and 'Type keywords'. A detailed view of California's 'Revenue and Taxation Code - RTC' is shown, featuring a table of contents for 'DIVISION 1 PROPERTY TAXATION [50 - 5911]' with various parts listed, such as 'PART 0.5 IMPLEMENTATION OF ARTICLE XIII A OF THE CALIFORNIA CONSTITUTION [50 - 100.96]' and 'PART 1 GENERAL PROVISIONS [101 - 198.1]'. Green arrows point to the search bar, the 'Audit Manuals' link in the sidebar, and the detailed view of the code.

Updated monthly!

Our State Tax Research Library is presented in a clean, uniform, and user-friendly format.

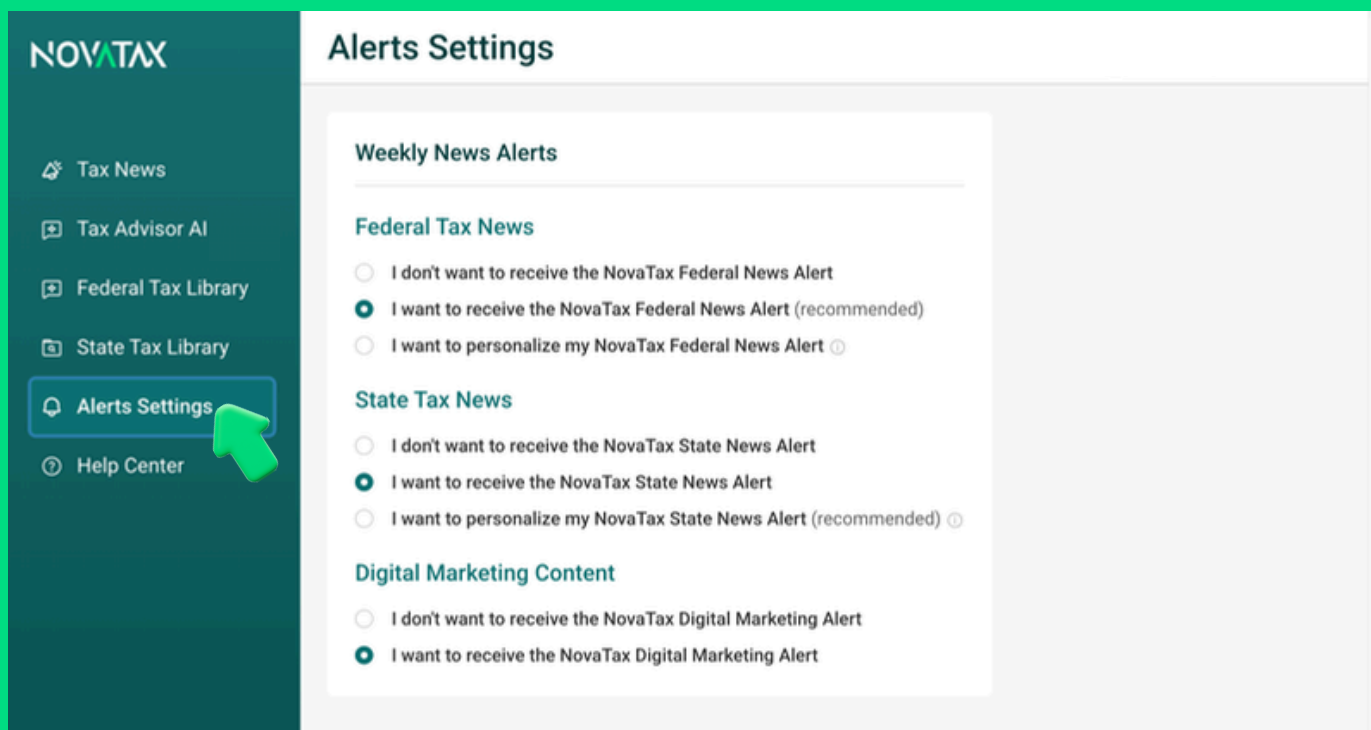
- Keyword searching and enhanced Table of Contents make locating the materials you need easy.

Be prepared for a State Tax audit with our unique collection of audit manuals that auditors themselves use.

CUSTOMIZABLE NEWS ALERTS

We partner with industry leader **Tax Analysts®** to bring you the latest Federal & State Tax News. Our news provides insightful analysis and detailed explanations from industry specialists to keep you informed!

- **Federal Tax News** consists of 18-20 articles each week focusing on tax topics impacting your small to mid-sized firm or business.
- **State Tax News** consists of 70+ articles each week covering all 50 States and D.C., including news impacting multiple States.



Customize your weekly E-mail alerts through your “Alerts Settings”!

What do we recommend?

- **Set your Federal Tax News alerts to receive ALL the Federal Tax News alerts.**
- **Personalize your State Tax News alert to include news from just the States you want and select Multi-state Topics (packed with valuable information).**

TIP! Email alerts are delivered to your inbox each Monday morning, but you can always access news documents on the NovaTax platform. Federal Tax News is published weekly. State Tax News is published daily.

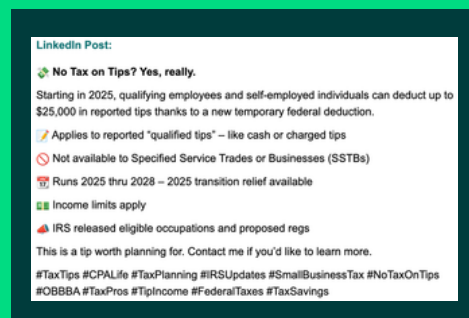
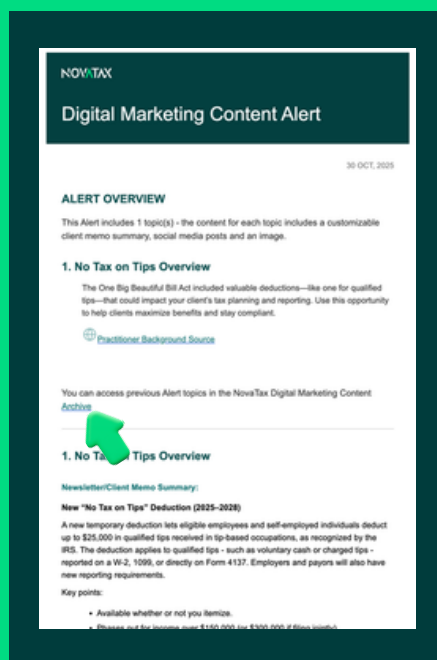
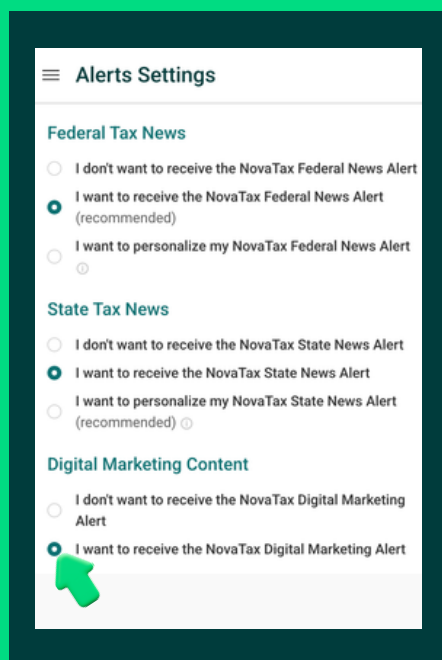
DIGITAL MARKETING CONTENT

Smart shortcuts aren't cutting corners — they're just good strategy. That's why we've created a Digital Marketing Content feature designed to give you a head start.

We turn complex Federal and State Tax information into clear, customizable content, so you can focus on client connection and growing your practice.

Opt-in on your **Alerts Settings** page to access:

- Customizable summaries perfect for newsletters, emails, and your website
- Ready-to-go social posts for LinkedIn and Facebook
- Images to elevate your marketing materials and keep clients and prospects engaged



What do we recommend?

- **Opt-in to access our Digital Marketing Content.**
- **Copy-Paste. Add your voice. Expand your outreach. It's that simple.**

TIP! Digital Marketing Content Alerts are delivered to your inbox on designated Fridays. Copies of each Alert are stored for 3 months in our Digital Marketing Content Archive. Click on the "Archive" link in an Alert to access.



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For further training, please visit
our Help Center.

THANK YOU!

WWW.NOVATAXINTELLIGENCE.COM

