BPP
LYCEUM EDUCATION GROUP

AI for Tax Accountants

Use AI in tax work. **Keep tax judgement at the centre.**

Designed by tax experts. Delivered by AI experts.

Apply AI to the work you already know

- Live, instructor-led training
- Applied to real tax work
- Foundational and Practitioner levels
- From single tasks to a workflow
- Guided practice and expert review

Build the tax position from stronger foundations

Use AI to organise records, investigate tax questions and identify the facts needed to support your work.

Why this matters now

A tax answer is only as reliable as the facts, records and authority behind it. Missing information, changed guidance or the wrong period can alter the position entirely. These courses help you use AI to prepare returns and advice more effectively, from structuring client information to researching a question and developing first drafts, while you remain responsible for technical accuracy, evidence and sign-off.

Course 1

Foundational

Use AI more effectively in individual tasks

Work you'll recognise: researching an issue with incomplete client facts and investigating return data that does not reconcile.

You'll leave able to

1. **Use AI to support tax research, preparation, data review and client communication**
2. **Verify the jurisdiction, period and authority behind AI-generated claims**
3. **Identify missing facts and unsupported tax positions for professional review**

Course 2

Practitioner

Use AI to connect multiple tasks into a workflow

Work you'll recognise: mapping one area of tax work into tasks and hand-offs; running missing facts and changed guidance through it.

You'll leave able to

1. **Pick a useful AI step in tax preparation and map its inputs and human decisions**
2. **Build and test a guided prototype on approved sources, including missing records and outdated guidance**
3. **Explain the permissions, review, escalation and evidence needed before a workplace pilot**

Tested working drafts and evidence for a next step, not approval to deploy.

At a glance

Learn

10 hours over two days
Live online and instructor-led

Apply

Within two weeks
In the workplace
One approved task based on real tax work
Instructor feedback

Review in group

1 hour group clinic
Live online and instructor-led
Shared peer learnings

Ongoing support

Templates, checklists and case examples available from day one, plus 90 days of support.

Ways to join

Courses run in cohorts of 15 learners.

Have enough people for a full cohort? Train your team together, on your own tax work and review standards. We can even explore tailoring.

Not quite enough people, or want to test it first? Talk to us about your team's needs.

£7,000
Full closed cohort

Cost is per course. Prices exclude VAT.

What you'll learn

Practical skills to bring AI into your role, whatever your starting point.

Course 1: Foundational

You'll learn to use AI on the task in front of you, and check the answer before you rely on it.

1. Gain confidence with AI in tax

Know which tasks suit AI, spot data issues early and write prompts that give defensible answers.

2. Use AI for everyday tax work

Cut busy-season workload with checklists, summaries and client drafts, checked against authoritative sources.

3. Use AI tools with tax data

Ask sharper questions of sensitive data to spot anomalies in returns and reviews, and know when to escalate.

4. Use AI responsibly in tax

Protect client data, recognise AI-enabled fraud such as synthetic documents, and stay accountable for every tax position.

Course 2: Practitioner

You'll learn to design, build and test AI-supported tax workflows, assistants and agents, with human approval before anything is advised or submitted.

1. Design AI-enhanced tax workflows

Choose the tasks AI suits, map return and Making Tax Digital (MTD) workflows, and set where a person signs off.

2. Build and monitor AI workflows

Write reusable prompts grounded in approved sources, then test them and measure ROI before they touch client work.

3. Deploy AI assistants and agents

Design a grounded tax query assistant and an MTD quarterly update agent, with clear limits and human review.

4. Run multi-agent systems

Set roles, delegation and checkpoints so errors don't reach client returns or HMRC submissions, with audit trails throughout.

Who it's for

Roles

Tax professionals, including accountants, consultants and advisers, regardless of seniority or time in role.

Starting knowledge

Foundational requires no previous AI experience. Practitioner is for people who already use and check AI on individual tasks.

Not sure which course?

Course 1: Foundational

"I want to use AI better on the task in front of me."

Course 2: Practitioner

"I already use and check AI on individual tasks. Now I want to apply it to a repeatable workflow."

Choose by your AI experience, not your seniority.

Time and support

Learn live for 10 hours

Training, guided labs and feedback take place over two days. Materials available from day one; no advance study is required.

Apply one task

Within two weeks, try a suitable task using an approved tool and permitted information, or use a supplied case. Keep your reviewed work and a question for the instructor.

Return with your questions

Join a one-hour group clinic around day 30. Use the templates, checklists, worked cases and feedback for 90 days.

See your progress

Ongoing before-and-after reviews show where your skills and confidence are growing, and where to explore and practise next.

BPP
LYCEUM EDUCATION GROUP

Not sure where AI fits in your work?

Here's what you could learn to do.

Foundational

Turn client records into a research brief

- Organise records and research questions without treating a fluent draft as a tax conclusion
- Draft a first request for missing client information
- Check an AI answer's jurisdiction, period and authority before you use it

Practitioner

Prototype AI support for a preparation checklist

- Connect record organisation to period checks, source checks and professional review
- Test your instructions on missing records and changed guidance
- Set where a tax professional checks or approves

Why learn this with BPP?

Lecture
See an example explained

Lab
Try it in practice

Review
Review your result with an expert

Our accelerated learning framework moves learners between focused instruction, hands-on application and structured reviews. Built on practice, feedback and repetition, it turns knowledge into reliable, in-role performance.

We train professionals at all of the Big Four, so you're learning with a provider the profession already trusts.

We train professionals in 81% of FTSE 100 companies.

Two thirds of accountants in England and Wales have studied with us at some point in their career.

Is AI adoption a whole workforce priority?

From everyday work to building AI tools and leading AI decisions, our training covers every level. Connect pathways across apprenticeships, degrees, certifications and short courses, so your people strategy keeps pace with your AI strategy.

bpp.com/contact-bpp