Taxfix: the next personal-tax experience

Company research note | 19 September 2026 | Germany personal tax

Future direction and what matters

Assessment: Taxfix's strongest personal-tax opportunity is to turn its existing AI, documents, and expert services into a continuous path from life events to a resolved tax return. The commercial hypothesis is better filing completion and annual renewal, supported by lower avoidable expert effort. These are proposed priorities and metrics, not disclosed company targets.

Stated direction. Taxfix positions itself as an AI-native financial platform. Its November 2025 COO announcement emphasizes profitable growth, operating efficiency, customer experience, and expansion of the tax-adviser platform. The German subscription proposition already extends the relationship beyond filing season. Company · COO announcement · Subscription

Evidence of execution. TaxScouts adopted the Taxfix brand in September 2025; German self-employed services launched on 18 March 2026. These demonstrate broader ambition, but this proposal stays with German personal tax, as requested. Brand consolidation · Launch

Why the experience must go further. WISO already sells an integrated AI assistant. ELSTER now advertises automatic preparation for eligible simple cases through MeinELSTER+, introduced in July 2026. Our inference: convenience and generic answers alone face increasing competitive pressure. Taxfix can make a stronger case through actionable help with life changes, missing information, and unresolved outcomes. WISO · ELSTER

Product priority proposed for discussion	Commercial implication	Metric to validate
Identify the next useful action	Convert intent into completed returns	Eligible started returns reaching submission
Turn a voice conversation into reviewed facts	Reduce effort and abandonment	Completion time; confirmed-fact accuracy
Resolve evidence gaps with visible human review	Scale quality without extra back-and-forth	Readiness rate; expert handling time
Explain the tax office's response and prepare follow-through	Build trust beyond submission	Resolution time; annual renewal

Business and current products

Founded in 2016 by Mathis Büchi and Lino Teuteberg, Taxfix operates in Germany, the UK, and Spain. The group combines tax software and expert-assisted services; Steuerbot is also part of its portfolio. The current corporate page reports **more than 10 million cumulative returns, over EUR 5 billion in refunds, and over 400 employees**. Returns are not unique customers; refunds are not revenue. Corporate profile · CFO interview

In Germany, **Start** estimates a refund, **Basic** supports self-filing, and **Expert** uses independent tax professionals. Basic currently lists EUR 39.99/year for individual assessment with a subscription, or EUR 49.99 once; joint assessment is EUR 59.99/year or EUR 69.99 once. Expert is described as 20% of the refund, minimum EUR 99.99. Some subscription eligibility messages conflict across pages and need checking in the relevant checkout. Pricing

Existing capabilities include document recognition and tax-field assignment, a context-aware subscription AI chat with human support described in the marketing, and educational content. Basic's FAQ distinguishes general support from subscription tax questions. These are the starting assets for the proposal, not new ideas to claim we invented. Subscription features · Basic FAQ

Leaders and financial context

The current leadership page names Martin Ott (CEO), Kristen Waeber (CPO), Snir Yarom (CTO), Mohamed Omaizat (CFO), Markus Berger-de León (COO), Alexander Beresford (Chief Growth Officer), and Eva Glanzer (Chief People Officer). Waeber took over the product role in May 2025. For this proposal, product, operations, technology, and growth are the most relevant stakeholder lenses. Leadership · CPO appointment

A dated CFO interview reports **2023 group revenue of EUR 55.9 million**, up 45% from EUR 38.5 million in 2022. In October 2025 the CFO described a high-double-digit-million-euro 2025 revenue ambition and said break-even had not yet been reached. Those statements are historical reporting and a target, not verified 2025 results or current profitability. Interview, 23 October 2025

The April 2022 Series D raised **USD 220 million at a valuation above USD 1 billion**, led by Teachers' Venture Growth. This is a historical financing valuation. Current consolidated revenue, profitability, cash runway, paid-customer count, subscription mix, and retention were not verified. Entity-level 2024 figures appear in a secondary register service; the appendix explains why they should not be treated as group results. Investor announcement

Recommended thesis for discussion: Taxfix helps you know what matters, explain what changed, resolve what is missing, and understand the final outcome. The four proposed journeys and evidence limits are in the accompanying opportunity note and appendix.