

Ten Tips to Help You Choose a Tax Preparer

Excerpt from Issue Number: IRS Tax Tip 2013-07
our firm's responses are in blue.

Many people look for help from professionals when it's time to file their tax return. If you use a paid tax preparer to file your federal income tax return this year, the IRS urges you to choose that preparer carefully. Even if someone else prepares your return, you are legally responsible for what is on it.

Here are ten tips to keep in mind when choosing a tax return preparer:

1. Check the preparer's qualifications. All paid tax return preparers are required to have a Preparer Tax Identification Number. In addition to making sure they have a PTIN, ask if the preparer belongs to a professional organization and attends continuing education classes.

Each preparer in our firm is a certified public accountant registered with the Internal Revenue Service holding a current PTIN.

2. Check on the preparer's history. Check with the Better Business Bureau to see if the preparer has a questionable history. Also check for any disciplinary actions and for the status of their licenses. For certified public accountants, check with the state boards of accountancy. For attorneys, check with the state bar associations. For enrolled agents, check with the IRS Office of Enrollment.

Each preparer in our firm holds a State of Delaware Board of Accountancy licensed certificate. You can see them displayed in each of our offices. Our firm is also licensed through the State Board of Accountancy.

3. Ask about service fees. Avoid preparers who base their fee on a percentage of your refund or those who claim they can obtain larger refunds than other preparers can. Also, always make sure any refund due is sent to you or deposited into an account in your name. Taxpayers should not deposit their refund into a preparer's bank account.

Our firm charges based on the complexity of each unique tax return, not a percentage of your refund.

4. Ask to e-file your return. Make sure your preparer offers IRS e-file. Any paid preparer who prepares and files more than 10 returns for clients must file the returns electronically, unless the client opts to file a paper return. IRS has safely and securely processed more than one billion individual tax returns since the debut of electronic filing in 1990.

We offer free electronic filing with every prepared return. The taxpayer may still choose to paper file but e-filing is quicker and prone to less errors.

5. Make sure the preparer is accessible. Make sure you will be able to contact the tax

preparer after you file your return, even after the April 15 due date. This may be helpful in the event questions arise about your tax return.

Our office is open year round for all of your accounting needs.

6. Provide records and receipts. Reputable preparers will request to see your records and receipts. They will ask your questions to determine your total income and your qualifications for deductions, credits and other items. Do not use a preparer who is willing to e-file your return by using your last pay stub before you receive your Form W-2. This is against IRS e-file rules.

We request all tax documents and receipts to substantiate your tax return. We return all original documents to you after your return is prepared.

7. Never sign a blank return. Avoid tax preparers that ask you to sign a blank tax form.

Your signature is only required on your completed tax return.

8. Review the entire return before signing. Before you sign your tax return, review it and ask questions. Make sure you understand everything and are comfortable with the accuracy of the return before you sign it.

We require our clients to review their returns prior to e-filing. In addition, we secure your signature on all Federal and State e-filing forms in our files.

9. Make sure the preparer signs and includes their PTIN. A paid preparer must sign the return and include their PTIN as required by law. The preparer must also give you a copy of the return.

Each return is printed with our name, PTIN, and date signed. We provide copies of your tax returns along with your original documents once the return is completed.

10. Report abusive tax preparers to the IRS. You can report abusive tax preparers and suspected tax fraud to the IRS on Form 14157, Complaint: Tax Return Preparer. If you suspect a return preparer filed or altered a return without your consent, you should also file Form 14157-A, Return Preparer Fraud or Misconduct Affidavit. Download the forms on the [IRS.gov](https://www.irs.gov) website or order them by mail at 800-TAX-FORM (800-829-3676).