

IRS Tax Tip

Ten Things to Think About When Choosing a Tax Preparer

It is the time of the year when many taxpayers choose a tax preparer to help file a tax return. These taxpayers should choose their tax return preparer wisely. This is because taxpayers are responsible for all the information on their income tax return. That is true no matter who prepares the return.

Here are ten tips for taxpayers to remember when selecting a preparer:

Check the Preparer's Qualifications

People can use [the IRS Directory of Federal Tax Return Preparers with Credentials and Select Qualifications](#). This tool helps taxpayers find a tax return preparer with specific qualifications. The directory is a searchable and sortable listing of preparers.

Check the Preparer's History

Taxpayers can ask the Better Business Bureau about the preparer. Check for disciplinary actions and the license status for credentialed preparers. For CPAs, people can check with the State Board of Accountancy. For attorneys, they can check with the State Bar Association. For Enrolled Agents, taxpayers can go to the [verify enrolled agent status](#) page on IRS.gov or check the [directory](#).

Ask about Service Fees

People should avoid preparers who base fees on a percentage of the refund or who boast bigger refunds than their competition. When asking about a preparer's services and fees, don't give them tax documents, Social Security numbers or other information.

Ask to E-File

Taxpayers should make sure their preparer offers IRS e-file. The quickest way for taxpayers to get their refund is to [electronically file](#) their federal tax return and use direct deposit.



Make Sure the Preparer is Available

Taxpayers may want to contact their preparer after this year's April 15 due date. People should avoid fly-by-night preparers.

Provide Records and Receipts

Good preparers will ask to see a taxpayer's records and receipts. They will ask questions to figure things like the total income, tax deductions, and credits.

Never Sign a Blank Return

Taxpayers should not use a tax preparer who asks them to sign a blank tax form.

Review Before Signing

Before signing a tax return, the taxpayer should review it. They should ask questions if something is not clear. Taxpayers should feel comfortable with the accuracy of their return before they sign it. They should also make sure that their refund goes directly to them – not to the preparer's bank account. The taxpayer should review the routing and bank account number on the completed return. The preparer should give you a copy of the completed tax return.

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Ensure the Preparer Signs and Includes Their PTIN

All paid tax preparers must have a Preparer Tax Identification Number. By law, paid preparers must sign returns and include their PTIN.

Report Abusive Tax Preparers to the IRS

Most tax return preparers are honest and provide great service to their clients. However, some preparers are dishonest. People can report abusive tax preparers and suspected tax fraud to the IRS. Use [Form 14157](#), Complaint: Tax Return Preparer. If a taxpayer suspects a tax preparer filed or changed their return without the taxpayer's consent, they should file [Form 14157-A](#), Return Preparer Fraud or Misconduct Affidavit.

More information:

[Understanding Tax Return Preparer Credentials and Qualifications](#)

[Tax Topic 254 - How to Choose a Tax Return Preparer](#)

[Choosing a Tax Professional](#)

[How to Make a Complaint About a Tax Return Preparer](#)

[How to Report Suspected Tax Fraud Activity](#)

[IRS Tax Pro Association Partners](#)

The preceding is an article by the IRS Issue Number: IRS Tax Tips 2019-06.

Contact Us

If you would like to discuss how Cole, Newton & Duran's tax team can help answer questions regarding this tax season, please feel free to give me a call.

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