

Tips for Choosing a Paid Tax Preparer

Qualifications to Prepare Tax Returns

In most states, the only requirement to become a paid tax preparer is to register with the IRS and obtain a PTIN (Preparer Tax Identification Number), but there is no test of tax return preparation knowledge to obtain a PTIN.

Before Choosing a Preparer: Check their Credentials

- Select a tax preparer that you can contact later in case the IRS has questions about your tax return.
- Ask your friends, family and community members for recommendations. You can also research the tax preparer with your local Better Business Bureau (www.bbb.org) to see if any complaints have been filed.
- Ask about fees to have your taxes prepared before scheduling an appointment. Be sure to ask if there are any fees for additional schedules or forms, like the Schedule EIC, used to claim the Earned Income Tax Credit (EITC).

While at a Tax Preparer

- Do not leave originals of documents with a tax preparer if he or she needs to work on your tax return when you are not present.
- Avoid a tax preparer who suggests you lie or make up information. You will be held responsible for errors, not the preparer.
- Do not sign a blank tax return or a return completed in pencil. Sign a tax return in pen, only after you've reviewed and understand it. Check names, addresses, Social Security numbers and wage information. Ask questions to understand the reason for any refund you get or taxes that you owe.
- Check to make sure the tax preparer signs the return. The tax preparer must include his/her name, address and Preparer Identification Number (PTIN).
- Request a copy of your completed tax return. Write down the preparer's phone number to call if you have additional questions about your tax return later.

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