



# IRS Tax Tip 2015-07: Ten IRS Tips to Help You Choose a Tax Preparer

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IRS Tax Tips

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### Ten IRS Tips to Help You Choose a Tax Preparer

Many people pay to have their taxes prepared. You need to be careful when you pick a preparer to do your taxes. You are legally responsible for all the information on the tax return even if someone else prepares it. Here are 10 IRS tax tips to help you choose a tax preparer:

**1. Check the preparer's qualifications.** All paid tax preparers are required to have a Preparer Tax Identification Number or PTIN. The IRS will soon offer a new Directory of Federal Tax Return Preparers with Credentials and Select Qualifications on IRS.gov. You will be able to use this tool to help you find a tax return preparer with the qualifications that you prefer. The Directory will be a searchable and sortable listing of certain preparers with a valid PTIN for 2015. It will include the name, city, state and zip code of:

- Attorneys.
- CPAs.
- Enrolled Agents.
- Enrolled Retirement Plan Agents.
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**2. Check the preparer's history.** You can check with the Better Business Bureau to find out if a preparer has a questionable history. Check for disciplinary actions and the license status for credentialed preparers. For CPAs, check with the State Board of Accountancy. For attorneys, check with the State Bar Association. For Enrolled Agents, go to [IRS.gov](#) and search for "[verify enrolled agent status](#)."

**3. Ask about service fees.** Avoid preparers who base their fee on a percentage of your refund or those who say they can get larger refunds than others can. Always make sure any refund due is sent to you or deposited into your bank account. You should not have your refund deposited into a preparer's bank account.

**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 generally must e-file their clients' returns. The IRS has safely processed more than 1.3 billion e-filed tax returns.

**5. Make sure the preparer is available.** You need to ensure that you can contact the tax preparer after you file your return. That's true even after the April 15 due date. You may need to contact the preparer if questions come up about your tax return at a later time.

**6. Provide tax records.** A good preparer will ask to see your records and receipts. They ask you questions to report your total income and the tax benefits you're entitled to claim. These may include tax deductions, tax credits and other items. Do not use a preparer who is willing to e-file your return using your last pay stub instead of your Form W-2. This is against IRS e-file rules.

**7. Never sign a blank tax return.** Do not use a tax preparer who asks you to sign a blank tax form.

**8. Review your return before signing.** Before you sign your tax return, review it thoroughly. Ask questions if something is not clear to you. Make sure you're comfortable with the information on the return before you sign it.

**9. Preparer must sign and include their PTIN.** Paid preparers must sign returns and include their PTIN as required by law. The preparer must also give

you a copy of the return.

**10. Report abusive tax preparers to the IRS.** You can report abusive tax preparers and suspected tax fraud to the IRS. Use [Form 14157](#), Complaint: Tax Return Preparer. If you suspect a return preparer filed or changed the return without your consent, you should also file [Form 14157-A](#), Return Preparer Fraud or Misconduct Affidavit. You can download and print these forms on IRS.gov. If you need a paper form by mail go to [IRS.gov/orderforms](http://IRS.gov/orderforms) to place an order.

If you found this Tax Tip helpful, please share it through your social media platforms. A great way to get tax information is to use [IRS Social Media](#). You can also subscribe to [IRS Tax Tips](#) or any of our [e-news subscriptions](#).

#### **Additional IRS Resources:**

- [Tax Topic 254](#) - How to Choose a Tax Return Preparer
- [Choosing a Tax Professional](#)
- [Understanding Tax Return Preparer Credentials and Qualifications](#)
- [Verify the Status of an Enrolled Agent](#)
- [How to Make a Complaint About a Tax Return Preparer](#)
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