

 Fact Sheet

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## Tips for Choosing a Tax Return Preparer

IRS YouTube Video: *Choosing a Tax Preparer*: [English](#) | [ASL](#)

Podcast: [Choosing a Tax Preparer](#)

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If you pay someone to prepare your tax return, the IRS urges you to choose that preparer wisely. Taxpayers are legally responsible for what's on their tax return even if it is prepared by someone else. So, it is important to choose carefully when hiring an individual or firm to prepare your return. Most return preparers are professional, honest and provide excellent service to their clients.

Here are a few points to keep in mind when someone else prepares your return:

- **Check the person's qualifications.** Ask if the preparer is affiliated with a professional organization that provides its members with continuing education and resources and holds them to a code of ethics. New regulations effective in 2011 require all paid tax return preparers including attorneys, CPAs and enrolled agents to have a Preparer Tax Identification Number.
- **Check the preparer's history.** Check to see if the preparer has a questionable history with the Better Business Bureau and check for any disciplinary actions and licensure status through the state boards of accountancy for certified public accountants; the state bar associations for attorneys; and the IRS Office of Professional Responsibility for enrolled agents.
- **Find out about their 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.
- **Make sure the tax preparer is accessible.** Make sure you will be able to contact the tax preparer after the return has been filed, even after the April due date, in case questions arise.
- **Provide all records and receipts needed to prepare your return.** Most reputable preparers will request to see your records and receipts and will ask you multiple questions to determine your total income and your qualifications for expenses, deductions and other items.

- **Never sign a blank return.** Avoid tax preparers that ask you to sign a blank tax form.
- **Review the entire return before signing it.** 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.
- **Make sure the preparer signs the form and includes his or her preparer tax identification number (PTIN).** A paid preparer must sign the return and include their PTIN as required by law. Although the preparer signs the return, you are responsible for the accuracy of every item on your return. The preparer must also give you a copy of the return.

The IRS can help many taxpayers prepare their own returns without the assistance of a paid preparer. Before seeking a paid preparer, taxpayers might consider how much information is available directly from the IRS through the IRS Web site. Check out these helpful links:

- [Free File](#)
- [e-file for Individual Taxpayers](#)
- [Free Tax Return Preparation For You by Volunteers](#)

You can report abusive tax preparers to the IRS on [Form 14157](#), Complaint: Tax Return Preparer or by sending a letter to:

Internal Revenue Service  
Fresno, CA 93888

Download Form 14157 and fill it out or order by mail at 800-TAX FORM (800-829-3676).

**Related Links:**

[PTIN Requirements for Return Preparers](#)

[The Office of Professional Responsibility](#)

[Where Do You Report Suspected Fraud Activity?](#)