

## Sample article for organizations to use to reach customers (679 word count)

*Customize and post the following article on your websites and/or use in other communication vehicles to help your customers choose a tax preparer.*

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### Tips to help you choose a tax preparer

Many people look for help from professionals when they file their federal income tax return. If you choose to use a tax return preparer, you'll need to share your most personal information with them, including details about your marriage, income, children and social security numbers — the details of your financial life.

Most tax return preparers provide outstanding service. However, each year, some taxpayers are hurt financially because they choose the wrong tax return preparer.

Here are 10 tips to keep in mind when choosing a tax return preparer:

- **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.
- **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 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](#).
- **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. Also, always ensure 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.](#)
- **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.
- **Make sure the preparer is available.** 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.
- **Provide records and receipts.** Reputable preparers will request to see your records and receipts. They will ask 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.

- **Never sign a blank return.** Avoid tax preparers who ask you to sign a blank tax form.
- **Review your 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.
- **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.
- **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. You can download or order the forms on the [IRS.gov](#) website.

If you decide to use a paid tax preparer, remember that you are legally responsible for what is on it — even if someone else prepares your return.

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**Note to editor:** Below are additional resources available on [IRS.gov](#).

- [Tax Topic 254](#) - How to Choose a Tax Return Preparer
- [Choosing a Tax Professional](#)
- [Verify the Status of an Enrolled Agent](#)

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You are responsible for your #tax return. 10 #IRS tips for choosing a tax preparer.  
<http://go.usa.gov/sYdm>