

## Choosing a Tax Professional: What to Watch For

It is never too early to begin getting together your tax documents and/or thinking about hiring a tax professional. The Office of Consumer Affairs offers these suggestions from the IRS when choosing a tax professional for filing your return:

- Check the person's qualifications.** Federal regulations require all paid tax return preparers to have a Preparer Tax Identification Number (PTIN). In addition to making sure they have a PTIN, ask if the preparer is affiliated with a professional organization and attends continuing education classes. The IRS is also phasing in a new test requirement to make sure those who are not an enrolled agent, attorney, or CPA have met minimal competency requirements. Those subject to the test will become a Registered Tax Return Preparer once they pass it.
- Check the preparer's history.** Check to see if the preparer has a questionable history or any disciplinary actions with the [BBB](#), the [Massachusetts Board of Accountancy for Certified Public Accountants](#), or the [Massachusetts Bar Association](#).
- 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. Also, always make sure any refund due is sent to you or deposited into an account in your name. Under no circumstances should all or part of your refund be directly deposited into a preparer's bank account.
- Make sure the tax preparer is accessible.** Make sure you will be able to contact the tax preparer after the return has been filed in case any questions arise.



Visit the [IRS website](#) for more tips on identifying and avoiding Abusive Return Preparers, or call them at **1-800-829-1040**.

## Tips for Preparing Taxes

Here are some additional tips when preparing your taxes:

- Provide all records and receipts needed to prepare your return. 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.
- Do not electronically file your return before you receive your Form W-2 using your last pay stub. This violates IRS e-file rules.
- Never sign a blank return. Before you sign your tax return, review it and ask questions. Make sure you understand everything, that there are no blank spaces, and that you are comfortable with the accuracy of the return before you sign it.
- The Earned Income Tax Credit is a refundable tax credit intended to help low and moderate income workers hold onto more of their income. Potential qualifying workers include people who live in rural areas, are self-employed, receive certain disability pensions or have children with disabilities, are without a qualifying child, are grandparents raising grandchildren, or are recently divorced, unemployed or experienced other changes to their marital, financial or parental status. Taxpayers can check their eligibility by visiting the [IRS Credits & Deductions](#) website.