

How to Choose a Paid Tax Preparer

1. Decide if you need a paid preparer

If you earn \$57,000 or less, you might qualify for free tax preparation. Organizations that provide Volunteer Income Tax Assistance (VITA), like Accounting Aid Society, provide no-cost tax preparation through volunteers who are trained and IRS-certified. Each tax return is double-checked by another tax preparer to make sure your return is prepared accurately and you are receiving your maximum refund.

You can also file for free online through programs like IRS Free File delivered by [TurboTax](#) and [MyFreeTaxes](#). Even if your income is over the limit to qualify for the free versions, it's generally much more affordable than visiting a paid tax preparer.

2. Check the tax preparer's qualifications and history

The IRS requires anyone who prepares taxes for a fee to have a Preparer Tax Identification Number (PTIN). You can check if the preparer has a valid PTIN [here](#), but it's important to know that a PTIN doesn't always mean the preparer is experienced or up to date in tax law. PTIN holders have different levels of experience and skills. Once you determine that they have a valid PTIN, you might want to do a Google search to see their qualifications and experience, look at their reviews online, ask the preparer about their experience, or ask your friends and family for recommendations.

3. Make sure you're paying a fair fee

Ask for the price before you agree to your appointment. Walk away from any tax preparer who says they can get you a larger refund than another preparer or who charges a fee based on a percentage of your tax refund. Ask what's included in the fee - does it include state, federal and city tax preparation? Do they charge extra to electronically file your return, or directly deposit your refund?

4. Choose a preparer that can be contacted after tax season.

It's important that your tax preparer is around after your return is filed and after tax season in case the IRS has any questions or needs other information. Ask about their availability during the year, and make sure to get their telephone number and address to make sure they aren't a 'pop-up' tax preparer.

Dos and Don'ts

Dos

- Make sure the preparer's name, PTIN and address are on your return.
- Double check your return before you sign to make sure the information is correct.
- Ask for a copy of your completed return.
- Ask questions: How long have you been preparing taxes? Are you open year-round? How long will it take to prepare and file my return? What is included in the fee?

Don'ts

- Don't be afraid to 'pull the plug' or go to a different preparer. If you're uncomfortable, suspicious or unsatisfied with your services, you can walk away, even if you're halfway through the process or the tax deadline is soon.
- Never sign a blank return, or sign it in pencil.
- Never give tax documents, Social Security Numbers or other personal information to a preparer if you're just 'shopping around' and asking questions.