



CHOOSING A TAX PROFESSIONAL

→ *a checklist*

Choosing a tax professional is a big deal. Here are a few questions you might want to ask when you go to choose a tax professional.

Educational qualifications

- Do they have an accounting degree?
- Have they completed an in-house tax-preparing course?
- Do they focus solely on taxes?

Professional experience

- How long have they been in the business?
- Do they participate in ongoing professional development?
- Do they work on taxes year round?
- Do they specialize in your type of filing situation?
- Do they sign your tax return?

Additional tips

- Make sure your tax professional speaks your language, a bilingual tax professional is a major plus if you're bilingual too.
- Get a number to contact your tax preparer after the return has been filed should you have any additional questions.
- Note their Preparer Tax Identification Number (PTIN) for future reference.