



**Use these tips to evaluate whether the preparer will be able to assist you. There is no right or wrong answer and no threshold of how much experience a preparer should have. Use this guide to help determine if you are comfortable hiring a preparer and understand issues related to experience and cost.**

#### Tips for Choosing a Tax Preparer

##### 1. Check the preparer's qualification

Typically, the more qualified a preparer is, the higher the fees. The following are different types of tax preparers in order of expense and likely experience:

- Tax Attorney – Has the most specialized knowledge for complex situations and is likely the most expensive
- Certified Public Accountant (CPA)
- Enrolled agents - <https://www.irs.gov/tax-professionals/enrolled-agents>
- Tax preparation companies – given that experience varies greatly by company and by each preparer of the company, ask a lot of questions before hiring

##### 2. Check the preparer's history for any disciplinary action or to verify license status

##### 3. Ask about service fees:

- a. Know the maximum fee that could be charged
- b. Ensure any refund is paid directly to you and not the preparer
- c. Avoid preparers that promise a higher refund than other preparers or charge a fee based on percentage of refund

##### 4. Make sure the preparer is available and you know how to get in touch even after the filing season is over

##### 5. The preparer should be requesting records and receipts to prepare your return, including your W-2 or 1042-S (if applicable)

##### 6. Never sign a blank return

##### 7. Review your return before signing as you are responsible for all information reported on the return

##### 8. Ensure the preparer signs and includes their PTIN

##### 9. Report abusive tax preparers to the IRS

#### Tips specific to Nonresident or Dual-Status tax filers

##### 1. Ask how many 1040NR or 1040NR-EZ forms the preparer files each year.

##### 2. If you are an F, J, M or Q visa holder, ask the preparer if they are familiar with the rules that apply to your visa status, and whether they have experience filing returns with your visa status.

##### 3. If you are a dual status resident, ask how many dual status returns the preparer has filed.

#### Additional Resources:

1. IRS Website - <https://www.irs.gov/uac/choose-your-tax-preparer-wisely>
2. MA Website - <http://www.mass.gov/dor/individuals/filing-and-payment-information/filing-homepage/choosing-a-tax-preparer.html>