



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>

