

Points to Keep in Mind When Choosing A Tax Preparer

If you pay someone to prepare your tax return, the IRS urges you to choose that preparer wisely. **Taxpayers are legally responsible for what's on their tax return even if it is prepared by someone else.** So, it is important to choose carefully when hiring an individual or firm to prepare your return. Most return preparers are professional, honest and provide excellent service to their clients.

Here are a few points to keep in mind when choosing someone else to prepare your return:

1. **Ask if the preparer is affiliated with a professional organization that provides its members with continuing education and resources and holds them to a code of ethics.** –New regulations require all paid tax return preparers including attorneys, CPAs and enrolled agents to apply for a Preparer Tax Identification Number — even if they already have one — before preparing any federal tax returns in 2011.

For Accounting and Tax Advisory Services, Inc. aka ATAS the answer is Yes for membership in IMA – Institute of Management Accountants, attendance at IRS Tax Forums, and numerous other educational opportunities.

2. **Check on the preparer's history.** Check to see if the preparer has a questionable history with the Better Business Bureau and check for any disciplinary actions and licensure status through the state boards of accountancy for certified public accountants; the state bar associations for attorneys; and the IRS Office of Professional Responsibility for enrolled agents.

Since being in business since 1996, there have not been any complaints or unresolved issues. ATAS provided a client with W-2 and 1099's regardless of payments for services so those needing the forms would not be penalized for lack of information from their employer.

3. **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.

ATAS charges fees based on return preparation. We do not charge based on % of refund received by taxpayer. The refund belongs to the taxpayer and is a result of correct tax preparation.

4. **Make sure the tax preparer is accessible.** Make sure you will be able to contact the tax preparer after the return has been filed, even after the April due date, in case questions arise.

ATAS has been in business since 1996 and maintains an office and accessible presence year round.

5. **Provide all records and receipts needed to prepare your return.** Most 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.

Your information is what is used to prepare the return. We conduct a thorough interview with you for assurance that all matters have been disclosed for a correct tax return.

6. **Never sign a blank return.** Avoid tax preparers that ask you to sign a blank tax form.

See # 7 below for the answer to this one.

7. **Review the entire return before signing it.** Before you sign your tax return, review it and ask questions. Make sure you understand everything and are comfortable with the accuracy of the return before you sign it.

Personnel of ATAS go over each line item with you to educate and confirm the information is correct.

8. **Make sure the preparer signs the form and includes their PTIN.** A paid preparer must sign the return and include their PTIN as required by law. Although the preparer signs the return, you are responsible for the accuracy of every item on your return. The preparer must also give you a copy of the return.

ATAS does sign the form after it has been reviewed. We file electronically for all eligible returns and must have a signed form from you that allows us to do the e-file. It includes the PTIN and this number is also on your copy of the return.

You can report abusive tax preparers and suspected tax fraud to the IRS on Form 3949-A, Information Referral or by sending a letter to Internal Revenue Service, Fresno, CA 93888. Download Form 3949-A from <http://www.irs.gov> or order by mail at 800-TAX-FORM (800-829-3676).