



Checklist for Hiring a Tax Preparer

If you choose to hire a tax preparer, make sure to check off all the items on the list below first. This will help you to hire a preparer who is trustworthy, compliant with all tax laws, and a good fit for you.

- I've seen the preparer identification number (PTIN), issued by the Internal Revenue Service;
- I've seen a list of the tax preparer's fees, and received a written estimate.
- My refund will be deposited into my bank account or sent to my address - not my preparer's.
- The preparer will provide me with a copy of the return for review before it's filed, so I can ensure that it's accurate and ask the preparer to e-file the return.
- The preparer will sign and include the required information on my return including their PTIN.
- The preparer will be available after my return is submitted in case questions arise, ask if the preparer will represent you if you're audited.
- The preparer should not persuade you to put something on your return that is not true in order to secure a bigger refund, never sign a blank return.
- Imposing any fee for making or facilitating a refund anticipation loan or refund anticipation loan or check may charge a fee, but the preparer may not impose a fee or other consideration.
- Do your research. Research potential tax return preparers to determine if they match your personal requirement and are responsive to your questions.

File a complaint against a tax preparer

If you suspect that a tax preparer is engaged in illegal or improper conduct, please file a [complaint](#) with the Tax Department on our website.

The Tax Department will review your complaint promptly and, where appropriate, take corrective action, which may include sanctions.

Visit our website for more information. Visit our [Hiring a Preparer](#) website for more information.