

How to Find a Tax Preparer

1 Ways to shop for a tax preparer

- Ask your friends or family for a recommendation
- Google “Tax Preparation Service near me”
- Use websites for the **National Association of Enrolled Agents** or **Wisconsin Institute of Certified Public Accountants**.
- National chains are well known but smaller, local business also may be an option

NOTE

Enrolled Agents (EA) are licensed by the Internal Revenue Service (IRS) and Certified Public Accountants (CPA) are licensed by the Wisconsin state board of accountancy.



2

Create a list of 3 tax preparers to call- shop around!

3

Questions the tax preparer should be able to answer:

- How much do you charge to prepare my taxes?
- What forms of payment do you accept?
- What information or documents do you need from me to do my taxes?
- How long will it take for you to complete my taxes?
- If I have questions, how would I contact you? How long will it take for you to respond?
- When should I expect my tax return?

4

Choose a tax preparer based on their answers to your questions

You have the right to quality services based on your preferences and needs.

Tips from the IRS for choosing a tax preparer <https://www.irs.gov/taxtopics/tc254> include:

- Be wary of tax return preparers who claim they can obtain larger refunds than others can.
- Consider whether the individual or firm will be around for months or years after filing the return to answer questions about the preparation of the tax return.



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