

# 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 such as the **National Association of Enrolled Agents** or **Wisconsin Institute of Certified Public Accountants**.
- National chains are well known but smaller, local businesses may also be an option
- Use the **IRS Authorized E-File Provider Search Tool** if you are interested in electronically filing your taxes

### 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.



## 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.

## 2

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

## 3

Questions the tax preparer should be able to answer:

- How much will it cost for you 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?

