



RealLife
Tax Advice

featuring tax & financial expert
Abby Eisenkraft, EA

RealLifeTaxAdvice.com



Top Ten Questions To Ask When Hiring A Tax Pro

? 1) Do you have a credential?

While there are some bright, experienced people who do not have a credential to prepare taxes, it's best to work with an **Enrolled Agent** (a tax professional with a credential straight from the IRS), a **CPA** (but you need to ask if they prepare taxes, as not all certified public accountants handle taxes), or an **Attorney** that prepares taxes (again, not all attorneys prepare taxes, so you need to ask). Credentialed tax professionals are required to take continuing education all year, and are regulated by IRS Circular 230.

? 2) Are you available year-round?

If you receive a notice after the tax season ends, you want to be sure you can locate your tax professional for assistance. Those shops that are gone after April 15th are of no use to you long-term.

? 3) Will I be working with one person in the office?

If the office is an assembly line and you are always talking to someone else, that's not a good sign. You want to work with someone you are comfortable with, and not have to explain yourself to yet another person every time you call.



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4) Are you experienced with my special circumstances?

You may need to work with a preparer who specializes in working with self-employed people, as well as international situations (people coming to work in the U.S. from overseas, and U.S. people traveling overseas for work). If your tax professional does not specialize in your area, something could be missed - NOT GOOD!

5) Can you handle delinquent filings?

If you have unfiled tax years, you may need help beyond the current tax year. Make sure your preparer has extensive experience and can file any year and help non-filers get compliant.

6) Are you familiar with my state(s)?

If you moved, and let's say you now live in New York, your Colorado tax preparer may not be knowledgeable with NYS and NYC requirements. While s/he may be familiar with your previous tax situation, you maybe be best served by having a preparer with multi-state experience.



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7) How much do you charge?

While you want to get a ballpark estimate, you need someone who will thoroughly interview you, and potentially find things that you may not even know you need to report. Perhaps you don't think bitcoin or an account you share with your grandmother in a foreign country is something reportable, but it is. A good tax professional will interview you carefully. It is worth it to avoid the penalties for misreporting your tax situation. Remember: cheap is not necessarily good. There are lots of pop-up tax offices during the season, and they ARE cheap - and out to steal your identity! You want someone who have been in business a while, with a good reputation.

8) Do you use secure email?

In this era of rampant identity theft, do you really want your tax preparer sending your tax returns to you via unprotected email?

9) Do you outsource your work?

Yes, there are preparers who outsource their tax work, and those are not the folks you want to be working with.



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10) Do you do bookkeeping as well?

If you have a small business and don't have your books and records in order, you will need some bookkeeping help. Make sure that the preparer you choose is willing and able to assist you. Not all tax preparers offer bookkeeping services.

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