

Choosing-an-Accountant Checklist

The cheapest preparer is not always the safest. Verify these before you hand over a single document — and walk away from anyone who fails the red-flag test.

THE RULE

Verify the credential before you share anything

Verify the credential

Check	OK
They have a valid PTIN (every paid preparer must)	<input type="checkbox"/>
They are a CPA, IRS Enrolled Agent, or attorney	<input type="checkbox"/>
You checked the IRS preparer directory or state board yourself	<input type="checkbox"/>
They will sign your return (a 'ghost preparer' will not)	<input type="checkbox"/>

Understand the fee

Check	OK
The fee is in writing before any work	<input type="checkbox"/>
You know if it is flat or hourly	<input type="checkbox"/>
The fee is NOT a percentage of your refund	<input type="checkbox"/>
You know what is and is not included	<input type="checkbox"/>

Confirm the fit

Check	OK
They handle situations like yours (self-employed, ITIN, multi-state)	<input type="checkbox"/>
They explain things in language you understand	<input type="checkbox"/>
They give you a copy of your return	<input type="checkbox"/>
They are available after tax season if the IRS writes	<input type="checkbox"/>

Red flags — walk away

Saw it?	
Promises a big refund before seeing your records	■
Wants the refund sent to their account	■
Asks you to sign a blank return	■
Will not give a PTIN or sign the return	■
Pressures you to decide today	■

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