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## NEWS RELEASE

### NEED A TAX PREPARER? KEEP CALM AND CHECK THE LICENSE

(Sacramento, CA) –Many people turn to professionals when it's time to prepare their tax return. How do you know if a tax preparer is qualified? The California Board of Accountancy offers the following tips for selecting and working with a paid tax preparer. Remember, even if someone else prepares your return, you are legally responsible for its contents.

- **Check the preparer's qualifications.** In California, only licensed CPAs, Enrolled Agents, attorneys, or registered tax preparers are legally authorized to prepare your return for a fee, and not all can offer the same services. CPAs can provide a range of accounting services, including auditing; estate planning; financial accounting, analysis, and planning; forensic accounting and litigation support; management consulting; and tax planning and preparation. Establishing a relationship with a CPA you can trust has added benefits long after your taxes are filed.
- **Check the preparer's history.** If you are selecting a CPA, check the CBA License Lookup <http://www.dca.ca.gov/cba/lookup.shtml> to make certain he or she has a current and active CPA license. This is where you can also check for disciplinary actions. If choosing an attorney, information is available at the California Bar Association [www.calbar.org](http://www.calbar.org). For information on Enrolled Agents, visit the California Society of Enrolled Agents [www.csea.org](http://www.csea.org). Information on registered tax preparers is available at the California Tax Education Council [ctec.org](http://ctec.org). Also check for the Preparer Tax Identification Number (PTIN). All paid tax return preparers are required to have a PTIN.
- **Ask about fees up front.** Be wary of preparers who claim they can get you larger refunds than other tax preparers, or who base their fee on a percentage of your refund. Reputable tax preparers will generally arrive at similar results.
- **Make sure the preparer is accessible.** Where will your tax preparer be after April 15? Make certain you will be able to contact the tax preparer after you file your return, in the event there are questions about your return.
- **Never sign a blank return.** If a tax preparer asks you to sign a blank tax form, take your business elsewhere. You are responsible for the contents of your tax return. Also, always make sure any refund due is sent to you or deposited into an account in your name. Never deposit your refund into a preparer's bank account.
- **Review the entire return before signing.** Before you sign your tax return, review it and ask questions. Be certain you understand everything and are comfortable with the

accuracy of the return before you sign it.

- **Get a copy of your tax return.** The preparer must give you a copy of the return. Make sure the preparer signs the return and includes their PTIN, as required by law.

Most tax preparers are professionals who provide valuable services to taxpayers. However, if you have questions or concerns about a CPA, please contact the CBA Enforcement Division at [enforcementinfo@cba.ca.gov](mailto:enforcementinfo@cba.ca.gov) or (916) 561-1729.

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