

Choosing a Tax Preparer

If your tax situation is complex, you may want to hire a professional tax preparer. Choose the preparer carefully because you will be legally responsible for the tax return even if someone prepares it for you.

Types of Tax Preparers

There are several types of tax preparers.

National tax preparation companies	May or may not have very much experience with specialized tax returns such as non-resident returns. A relatively inexpensive option for less complex tax forms.
Enrolled agents	See National Association of Enrolled Agents [1] for information about the training and credentials of Enrolled Agents.
Certified Public Accountants (C.P.A.s)	See the American Institute of Certified Public Accountants [2] for information about the training and credentials of CPAs.
Tax attorneys	The most expensive choice. Probably only needed by those with very complex tax situations.

Selecting a Tax Preparer

You can find tax preparers through personal recommendations by friends or colleagues, through the phone book, or through professional organizations' web sites. Tax preparers can prepare both federal and state tax forms.

Tax Preparers to Avoid

We recommend that you avoid tax preparers who:

- Claim they can obtain larger refunds than other preparers
- Base fees on a percentage of the amount of the refund
- Have a records of complaints filed with organizations such as:
 - [Better Business Bureau](#) [3]
 - [State Bar of Michigan](#) [4]
 - [U.S. Department of Treasury Internal Revenue Service Office of Professional Responsibility for Enrolled Agents](#) [1]

Questions to Ask

It is important to be sure the tax preparer has experience preparing tax forms for people in your particular situation. Not all tax preparers understand the non-resident tax forms such as the 1040NR. It is also important to understand possible costs before agreeing to hire a tax preparer.

Examples of questions to ask your tax preparer include:

- What is the maximum amount I might have to pay to have my tax return prepared?
- Who will prepare my tax return and where will it be prepared? How can I contact this person?
- If you are a non-resident for tax purposes, ask how many Forms 1040NR the preparer does each year.
- If you are in F or J immigration status, ask if the preparer is familiar with the special rules that apply to F and J visa holders, and ask how many returns s/he does for F and J visa holders each year.
- If you will be required to file a “dual status” tax return (you were a tax resident for part of the year), ask how many dual status returns the preparer does each year.

After Your Form is Prepared

After the tax preparer finishes your return, he or she is required by law to sign the return, fill in the preparer areas of the form and include his/her identifying number, and give you a copy of the return. You should:

- Review the completed return to ensure all tax information, your name, address and Social Security or ITIN number(s) are correct.
- Make sure that you understand the form and make sure that it seems to be accurate.
- If you want the preparer to be able to talk to the IRS about how your return was prepared, check the “Third Party Authorization” box on the tax return form.
- Sign the tax return form.

Important: Never sign a blank return, and never sign in pencil.

Resources

For advice from the U.S. Department of Treasury Internal Revenue Service about choosing a paid tax preparer, refer to:

- [Tips for Choosing a Tax Preparer](#) [5]

Source URL: <https://internationalcenter.umich.edu/resources/tax/choosing-tax-preparer>

Links

[1] <https://www.irs.gov/tax-professionals/enrolled-agents>

[2] <https://www.aicpa.org/>

[3] <https://www.bbb.org/>

[4] <https://www.michbar.org/>

[5] <https://www.irs.gov/tax-professionals/choosing-a-tax-professional>