Choosing and Preparing for Your New Tax Professional

Selecting Your New Tax Preparer:

• Verify potential preparers' credentials and experience. We recommend an Enrolled Agent or CPA
• Determine if you prefer a virtual or local service
• Inquire about their communication style and preferred methods
• Understand their working procedures (appointments, portals, phone calls)
• Ensure their availability aligns with your schedule
• Verify their fee structure and payment terms

Preparing for Your First Appointment or Meeting:

• Gather and organize all relevant financial documents
• Prepare a complete spreadsheet, worksheet, or digital file of your financial information
• Collect photo IDs for all members of your tax household
• Download a copy of the last two year's returns
• Document any estimated tax payments made during the year
• List any changes in your financial situation or new items to discuss

Additional Considerations:

• If requested, upload documents to the preparer's portal before the appointment
• Provide your best contact email and phone number
• Discuss authorization for releasing information to third parties beforehand (e.g., bankers, family members)
• Be prepared to sign necessary forms and engagement letters

Remember: Being well-prepared ensures a smooth transition to your new tax preparer and helps them provide you with the best possible service.