

EARLE LAW OFFICES

A PROFESSIONAL CORPORATION
19925 STEVENS CREEK BOULEVARD
POST OFFICE BOX 1925
CUPERTINO, CALIFORNIA 95015

WWW.EARLELAW.COM

EARLELAW NEWSLETTER

408.786.1060

Eight Tips to Help You Choose a Tax Preparer

by Anthony F. Earle, Esquire*

Issue Number: 2010-01

It is important to exercise due diligence when selecting and retaining a tax professional. Remember, you are legally responsible for what's on your tax return even if it was prepared by another person or firm.

Most tax return preparers are professional, honest and provide excellent service to their clients. However, unscrupulous tax return preparers do exist and can cause considerable financial and legal problems for their clients. Therefore, it's important to find a qualified tax professional.

The following tips will help you choose a preparer who will offer the best service for your tax preparation needs.

1. Check qualifications. Ask if the preparer is affiliated with a professional organization that provides its members with continuing education and resources and holds them to a code of ethics.

2. Check professional record. Check to see if the preparer has any questionable history with the licensing authorities such as the IRS, the state's board of accountancy for CPAs, or the state's bar association for attorneys.

3. Ask about fees. Avoid preparers that base their fee on a percentage of the amount of your refund or those who claim they can obtain larger refunds than other preparers.

4. Determine accessibility. Make sure you will be able to contact the tax preparer after the return has been filed, even after April 15, in case questions arise.

5. Provide all records and receipts. Most reputable preparers will ask to see your records and receipts and will ask you multiple questions to determine your total income and your qualifications for expenses, deductions and other items.

6. Never sign a blank return. Avoid tax preparers that ask you to sign a blank tax form.

7. Review your return before signing it. Before you sign your tax return, review it and ask questions. Make sure you understand everything and are comfortable with the accuracy of the return before you sign it.

8. Make sure the preparer signs your return. A paid preparer must sign the return as required by law. Although the preparer signs the return, you are responsible for the accuracy of every item on your return. The preparer must also give you a copy of the return.

* * * * *

Special Offer

Representation by an attorney is included in the fee for every federal and California state tax return prepared by EARLE LAW OFFICES.¹ Attorney representation of taxpayer clients includes representation at audit, administrative appeal, and in civil litigation.

¹ Subject to certain conditions, limitations, and restrictions.

Tax controversy services are also available in cases where the disputed return was prepared by the taxpayer or a third party.

Further information on tax preparation and tax controversy services offered by EARLE LAW OFFICES is available at: www.EarleLaw.com/tax.

Please call EARLE LAW OFFICES today to schedule an appointment to have your 2009 tax returns prepared.

Earle Law Offices provides trial and appellate litigation, as well as non-litigation, legal services in the areas of business law, constitutional and civil rights law, family law, real estate law, tax law, and trusts and estates.

* Mr. Earle is licensed to practice law in all California state trial and appellate courts, the United States Supreme Court, the United States Court of Appeals for the Fourth and Ninth Circuits, federal trial courts in the Northern District of California, and the United States Tax Court. He has served as a Judge Pro Tempore for the Santa Clara Superior Court, and is also a licensed Real Estate Broker.

Mr. Earle received his law degree from the Santa Clara University School of Law, where he served as an Editor of the school's Law Review, and where he received awards for academic excellence. He received his undergraduate degree, with honors, in business administration from the University of La Verne.

EARLELAW NEWSLETTERS are provided for educational purposes only and should not be relied upon as a substitute for legal advice. Those who need legal advice or representation are encouraged to contact EARLE LAW OFFICES.

To request a free subscription to the electronic version of the EARLELAW NEWSLETTER, or to obtain a free copy of this or selected past editions of the EARLELAW NEWSLETTER, please visit: www.EarleLaw.com.

© 2010. All Rights Reserved.