



Factors to consider when hiring a tax preparer

Know what you need before you begin your search. Do you need a personal tax expert, or someone who also works with small businesses? The Ohio Society of CPAs offers a free CPA referral service for the public, available through a toll-free call or online. You can search for a CPA who has the exact expertise you need.

When interviewing a preparer, ask the following:

- Determine the certification and education of the preparer. You want someone who knows the tax code inside and out, like a CPA. Unlike some tax preparers who receive minimal training, CPAs are fully engaged in interpreting and applying tax law year-round, instead of just during tax time.

CPAs are college graduates who have passed the rigorous CPA professional examination and are licensed by the Accountancy Board of Ohio to practice public accounting. They take an additional 120 hours of continuing education every three years to maintain that license.

- How long he or she has been in business? Ideally, you should develop a long-term relationship with your CPA or tax preparer...someone who knows your entire financial situation. He or she should help you develop year-round strategies that can reduce your tax liability and make adjustments as your situation changes.
- **Ask for references.** Will the preparer provide a list of current or former clients whose situations or businesses are similar to yours?
- **Ask who will prepare your return.** Will you be working directly with the preparer or will most of your returns be prepared by someone else? This is an important point. If the returns are to be prepared by someone else, ask to interview that person directly to determine their credentials.
- **Ask the preparer how busy he or she is right now.** Even though it's tax season, you want to work with someone who is both accurate and efficient, not someone who waits until the last minute to finish your return. It's important to review the return in person with your preparer well in advance of April 15th. If you have a refund due, you don't want to file an extension or wait longer than necessary for your money.
- **Do you and the preparer generally agree on how to approach tax deductions?** Some preparers are highly aggressive when it comes to taking deductions, and this can make some of their clients uncomfortable. On the other hand, an overly conservative preparer may cost you money by not taking legitimate deductions. Find a good fit by discussing the preparer's attitude on deductions.

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- Will the preparer represent you if you are audited? If the IRS raises a question about a tax return, only CPAs, attorneys and enrolled agents are authorized to represent taxpayers before the IRS.
- Will the preparer pay any penalties caused by errors they or their associates make on your return?
- The bottom line is, a CPA or good tax preparer should find legitimate ways to save you money by uncovering exemptions, deductions and all credits to which you are entitled. Beyond that, they should work with you to implement strategies in 2009 that will save you money on next year's returns.

Professional Code of Conduct

CPAs adhere to a strict Professional Code of Conduct in serving the public and undergo a peer review every three years. This is a thorough inspection of their practices by other trained CPAs. The program is administered by The Ohio Society of CPAs under direction of the Accountancy Board of Ohio. The process is designed to ensure a higher level of accuracy and integrity in a CPA's work.

To Find a CPA in Ohio

Call toll-free 888.959.1212 or visit www.ohioscpa.com

Free Tax Tips

The Ohio Society has numerous tax resources for the public online at:
<http://www.ohioscpa.com/content/TaxHeadquarters.aspx>

Operation CPA

The Ohio Society of CPAs offers free tax preparation services. Ohio residents who are members of the military and deployed outside the state can have returns prepared free of charge by a CPA through Operation CPA, a partnership of The Ohio Society of CPAs and The Ohio National Guard.

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