



Checklist for Hiring a Tax Preparer

If you choose to hire a tax preparer, make sure to check off all the items on the list below first. This will help you to hire a preparer who is trustworthy, compliant with all tax laws, and a good fit for you.

- I've seen the tax preparer's registration certificate, or proof that the preparer isn't required to register with the IRS or NYS.
- I've seen a list of the tax preparer's fees, and I am comfortable with them.
- My refund will be deposited into my bank account—not my preparer's—or sent to my address.
- The preparer will provide me with a copy of the return for review before it's filed, so I can ensure that it's accurate.
- The preparer will sign and include the required information on my return.
- The preparer will file my return electronically.
- The preparer will be available after my return is submitted in case questions arise.

File a complaint against a tax preparer

If you suspect that a tax preparer is engaged in illegal or improper conduct, please file a complaint with the Tax Department:

- on our [website](#) , or
- by phone at 518-530-HELP.

The Tax Department will review your complaint promptly and, where appropriate, take corrective action, which may include sanctions.

Visit our website for more information.

www.tax.ny.gov