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Taxpayers should be careful when choosing a preparer

The New Mexico Taxation and Revenue Department urges taxpayers to be careful when choosing a tax preparer this tax season. There are many excellent professionals available to help you with your taxes, but less scrupulous players occasionally surface this time of the year.

Ultimately, it is the taxpayer's responsibility for what gets filed, regardless of who prepares the tax return. And tax returns necessarily involve sensitive personal and financial information that can be targets for identity theft.

Here are some points to consider when choosing and working with a tax preparer:

- Is the preparer available year-round? Will that person be around to answer questions **after** the return has been filed? Will he or she be available to explain the return in the event of inquiries from the IRS or NM Taxation and Revenue?
- Be wary of preparers who claim they can get you a larger refund than other preparers.
- Avoid preparers who base their fee on a percentage of any refund.
- What kind of training does the preparer have? Are they a licensed or designated professional, such as a certified public accountant (CPA), enrolled agent (EA) or other that requires formal training?
- Paid preparers should be registered with the IRS and have a Preparer Tax Identification Number (PTIN).
- Ask any preparer that you are considering for references.
- Insist that the preparer sign as the paid preparer of the return.
- Never sign a blank return.
- The preparer should meet with you to review the return before filing. Be sure to ask questions about anything you don't fully understand and make sure that all information entered on the return matches your records.
- Be sure to get a copy of your return, including all schedules, before it is filed.

Additional valuable information on choosing a tax preparer is available at IRS.gov.