

# ELDER LAW REVIEW

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## Tax Season Tips

The IRS began accepting tax returns on January 23, with many tax filers aiming to get their taxes done as soon as possible. The following, from the Better Business Bureau (BBB) of Minnesota and North Dakota, are tips for the public for finding a trustworthy tax preparer.

- ❖ Ask around. Obtain referrals from friends and family on who they use and research tax preparers at [www.bbb.org](http://www.bbb.org).
- ❖ Consider accessibility. Some tax preparers slow down their operations shortly after the April 18 (this is not a typo) tax deadline. In the event IRS finds errors or in case of an audit, be sure to know how to contact your tax preparer throughout the year.
- ❖ Bigger isn't always better. Be cautious of tax preparation services that promise larger refunds than the competition, and avoid tax preparers who base their fee on a percentage of your refund.
- ❖ Look for credentials. Ideally, your tax preparer should either be a certified public accountant, a tax attorney, an enrolled agent or a certified E-file provider.
- ❖ Make sure they have a Preparer Tax Identification Number (PTIN).
- ❖ Investigate whether the preparer has any questionable history with your state's Board of Accountancy (for CPAs), the State Bar Association (for attorneys) or the IRS Office of Professional Responsibility (OPR) for enrolled agents.
- ❖ Remember that a paid tax preparer is required by law to sign your return and fill in the preparer areas of the form. In addition, the preparer must provide you with a copy of your tax return.
- ❖ Read the contract carefully, to ensure you understand issues such as how much it will cost for the service, how that cost will be affected if your tax preparation is more complicated and time consuming than expected, and whether the tax preparer will represent you in case of an audit.

### Additional tax tips:

- ❖ Don't forget about Free File. If your adjusted gross income is \$64,000 or less, Free File offers free Federal tax preparation and e-filing. Visit [www.irs.gov/freefile](http://www.irs.gov/freefile) to learn more.
- ❖ According to the IRS, tax refunds are typically received quicker by using e-file or Free File, with the direct deposit option.
- ❖ Tax refund fraud. This is a form of identity theft where someone else fraudulently files a tax return in your name. This is a serious issue, one that is difficult to identify and can delay the tax refund you are due. One of the best ways to avoid falling victim to this type of fraud is to file your tax return as soon as possible.

Pluto Legal, PLLC offers prospective clients a NO-cost, NO-obligation consultation. This is a great opportunity for you to become informed of the options available to you for your Estate Planning and Medical Assistance Planning needs.

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