



# Choosing a Tax Preparer Who is Right for You

If you choose to use a tax preparer, it is important you find a qualified professional or volunteer. Even if someone else prepares your return, you are still responsible for the content and for any additional payments, penalty and interest that may result from an error.

Michigan does not require tax preparers to be licensed. However, many are licensed and certified, belonging to professional organizations that require a certain level of education and provide on-going training. Unqualified tax preparers may overlook legitimate deductions and/or credits, which could result in you paying more tax than you should. Services vary from preparer to preparer, so you will want to find one who offers the services you need.

## Important Things to Remember

- ▶ Taxpayers are responsible for the accuracy of all information on their return.
- ▶ Do not sign the return until you review it. Make sure all your personal information is correct (Social Security number, address, number of exemptions, sources and kinds of income, etc.)
- ▶ Never sign a blank form and never sign in pencil.
- ▶ You can allow Treasury to discuss this return with the tax preparer by checking the authorization box on the line just below your signature.
- ▶ Tax preparers must sign the return, fill in the preparer areas of the form(s) and provide you with a copy. Do not walk out the door without a copy of your return, as filed, in hand. Keep the copy of your return you are provided for future reference.

## What to Watch Out For

- ▶ Avoid those who claim they can obtain larger refunds than other preparers or those who "guarantee" results.
- ▶ Avoid those who base their fees on a percentage of the amount of your refund.
- ▶ Choose someone you can reach after the return is filed and who is responsive to your needs.
- ▶ Remember e-filed returns are usually processed faster than mailed returns. E-filed returns are still subject to review, and you should rely on Treasury for the time frames for processing returns, not the preparer.

## Free Tax Help Available for Qualified Taxpayers

The IRS's Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) programs offer free basic tax return preparation to qualified individuals. Generally, you can get this help from VITA/TCE if any of the following are true:

- Your income is \$60,000 or less
- You are a person with a disability
- You speak limited or no English
- You are age 60 or older

A majority of the TCE sites are operated by the AARP Foundation's Tax Aide program. AARP Tax-Aide sites do not have income or age restrictions but will only prepare basic returns.

Visit <https://www.irs.gov/individuals/free-tax-return-preparation-for-qualifying-taxpayers> for more information, to find a site near you, or prepare for a tax appointment.

In addition, the federal government offers free, electronic tax support to individuals with modest income. Through the <https://freefilealliance.org/>, (a partnership between the IRS and a group of private-sector tax preparation companies), free online tax preparation and electronic filing through services are available exclusively through the IRS website.

## Resources

- ▶ United Way's 211 – call **211** or online at <https://www.211.org/>
- ▶ IRS Free Tax Prep - <https://www.irs.gov/individuals/free-tax-return-preparation-for-qualifying-taxpayers>
- ▶ Accounting Aid Society - <https://accountingaidsociety.org/>
- ▶ American Association of Retired Persons (AARP) Tax Aide - <https://www.aarp.org/money/taxes/>
- ▶ Volunteer Income Tax Assistance (VITA) - <http://michiganfreetaxhelp.org/>
- ▶ National Association of Enrolled Agents - <https://www.naea.org/>
- ▶ Michigan Certified Public Accountants – Resources for Taxpayers - <https://www.micpa.org/resources/resources-for-taxpayers>

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