

## Sample article for organizations to use to reach customers (492 word count)

Publish/post the following article on your website or other communication vehicles for your customers looking for help with their taxes.

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### Tips for finding a paid tax preparer or free tax help

If you need help preparing your tax return, choose help wisely. As a taxpayer, you are legally responsible for everything reported on your tax return; whether you prepare it yourself or have someone else prepare it for you.

#### When selecting an individual or company to prepare your taxes, be sure to:

- Check the person or company's qualifications.  
*(Beginning in 2014, only four types of preparers will be authorized to prepare individual returns for compensation: Enrolled Agents, Registered Tax Return Preparers, Certified Public Accountants and Attorneys. Inquire about your preparer's professional status.)*
- Check the preparer's history
- Ask about their service fees
- Make sure they are accessible after the April due date in case you have a question about your return

#### The preparer you choose should:

- Ask you to provide all receipts and records needed to prepare your return
- Not ask you to direct any part of your refund to an account that is not in your or your spouse's name.
- Never ask you to sign a blank return
- Allow you to review the completed return, including all schedules and attachments, and explain it all to you before you sign it
- Sign the return and include their preparer tax identification number and provide you a copy

#### Planning for Tax Time

- Being organized and planning ahead can save time, money and headaches at tax time. Start gathering your records and exploring your options now. You'll have more time when you're not up against a deadline or anxious for your refund.
- Each household's financial circumstances are different so it's important to fully consider your specific situation and goals before making large financial decisions. And remember even some legitimate returns may require review and take longer so don't count on getting your refund by a certain date to pay for something important.

#### If you can't afford a paid preparer, there are several options for free tax preparation.

- [E-file with Free File](#) is an option available to most taxpayers with income less than \$57,000. It's available only at [IRS.gov](#) where a number of tax software companies make their products available for free.

- The [Volunteer Income Tax Assistance](#) program offers free tax preparation for low-to moderate-income taxpayers. To find a VITA site near you, visit [www.irs.gov](http://www.irs.gov) and type the word *VITA* in the search engine and click on “Free tax return preparation for you by volunteers.”
- [Tax Counseling for the Elderly](#) offers priority assistance to people who are 60 years of age and older. To find a TCE site, visit the [AARP locator web page](#) .
- Active duty military members and their families can receive free tax preparation assistance at VITA sites within their installations. The volunteers are trained and equipped to address military specific tax issues.

Free tax preparation assistance is closer than you think and now finding out where to go for help is just a matter of a few easy steps.