



*For immediate release*

**Contact**  
Gigi Jones  
PR Director  
916.296.6913 cell  
[gjones@ctec.org](mailto:gjones@ctec.org)

## **How to Find the Best Tax Preparer for You**

*What to know about California tax preparers and their different areas of expertise*

**Sacramento, CA (January 20, 2016)**— California is one of the few states that require paid tax preparers to be licensed or registered. Each professional has varying levels of skills and not all of them necessarily deal with preparing tax returns.

“The tax code is way too complex to know everything. Most professionals have an area of expertise,” said Margy Dunn, chair of the [California Tax Education Council \(CTEC\)](#), a nonprofit organization that is required by state law to manage the registration of more than 40,000 unlicensed tax preparers.

So which tax preparer is right for you? It depends on your financial situation.

**Attorney-** Any attorney, not just a tax attorney, can prepare your tax return; however, most attorneys only handle legal issues regarding your taxes. An attorney has unlimited representation rights to assist clients in court or before the IRS.

**Certified Public Accountant (CPA)-** CPAs are required to pass a qualifying accounting exam, but that does not mean they’re all experts on tax preparation. For the most part, CPAs can help you create an overall tax plan and guide you through complex financial situations. If you are mostly interested in tax preparation help, ask about their experience with filing tax returns. CPAs also have unlimited representation rights before the IRS.

**CTEC Registered Tax Preparer (CRTP)-** They must complete a qualifying education course on federal and state tax laws, pass a test from a CTEC-approved education provider, and then complete continuing education requirements each year. They are also required to obtain a \$5,000 surety bond to protect clients against fraud. Because CTEC is a state-based program, CRTPs have limited representation rights. It means they can only represent clients before the IRS with tax returns they prepared and signed. To qualify for limited representation rights, they must obtain a record of completion from the IRS [Annual Filing Season Program](#).

**Enrolled Agent (EA)-** They are regulated by the federal government. In fact, some are former IRS employees. Those who did not work for the IRS are required to pass a comprehensive IRS exam. EAs must also complete continuing education courses on federal tax laws. Similar to attorneys and CPAs, they have unlimited representation rights before the IRS.

To get more tips and advice, visit [KnowYourTaxPreparer.org](#).

CTEC is a nonprofit organization that was established in 1997 by the California State Legislature to protect taxpayers against fraud and incompetent tax preparers. Taxpayers can report unregistered tax preparers at [ctec.org](#).

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