

Tax Professional Interview Worksheet

Use this worksheet when interviewing a prospective tax professional. Score the professional through all five lenses rather than relying on a title alone

1. Credential

- What professional credential(s) or qualification(s) do you hold?
- How can I independently verify them?
- What continuing education do you complete to stay current?

Notes: _____

2. Practice Focus

- What percentage of your practice involves tax work?
- What types of taxpayers and returns do you work with most often?
- What types of clients are not a good fit for your practice?

Notes: _____

3. Competence

- How familiar are you with the tax issues that apply to my situation?
- How do you research technical issues outside your normal routine?
- Who reviews complex work?

Notes: _____

4. Experience

- How often do you work with taxpayers or businesses similar to me?
- Have you handled the entity types, transactions, states, or IRS issues I have?
- Who will prepare, review, and sign my return?

Notes: _____

5. Relationship

- Are you available year-round?
- How do clients communicate with you, and what response time should I expect?
- What happens if I receive an IRS or state notice after filing?

Notes: _____

Best-fit question: Does this professional's credential, practice focus, competence, experience, and relationship fit what I actually need?