

Retiring Tax Preparer Transition Worksheet

Use this while your longtime preparer is still available

Clarify the transition

- Is the practice closing, being sold, or transferring clients?
- Who will hold the records?
- How long will portal access remain available?
- Is there a recommended successor?
- Am I free to choose another professional?

Capture institutional knowledge

- Any unusual elections?
- Any basis or depreciation issues?
- Any unresolved IRS/state notices?
- Any carryovers not obvious from the PDF return?
- Any current-year planning already underway?

Gather records

- Prior federal and state returns
- Entity returns
- Depreciation / basis / carryover schedules
- Election statements
- IRS and state correspondence
- Planning workpapers

Choose successor

- Credential and verification
- Practice focus
- Relevant experience
- Planning model
- Year-round availability
- Secure workflow
- Fee and scope

The goal is not merely to find someone for next year. It is to preserve the tax history that connects one year to the next.