

Ghost Tax Preparer Warning Checklist

Review this before authorizing a paid preparer to file your return

Paid preparer identification

- I paid someone to prepare the return
- The signing paid preparer is identified on the return
- A required PTIN appears in the paid-preparer section
- The return is not incorrectly presented as self-prepared

Return review

- I reviewed filing status and dependents
- I reviewed income and major deductions/credits
- I understand significant items or asked questions
- I did not sign a blank or incomplete return

Refund and records

- Refund bank information is correct
- I understand any legitimate refund-transfer product being used
- I received a complete copy of the return
- I have the preparer's current contact information

If misconduct is suspected

- Preserve emails, texts, invoices, ads, payment records, and screenshots
- Obtain the filed return
- Review Form 14157 and, when applicable, Form 14157-A instructions
- Seek qualified help if the filed return needs correction

If you paid someone to prepare your return, they should not be a ghost on the return.

Primary references

- IRS - Tax Return Preparer Misconduct
- IRS - Choosing a Tax Professional