

Tax Professional Practice Focus Checklist

Determine whether the professional's daily work resembles your tax situation

Ask

- What percentage of your practice is tax?
- What return types do you prepare most often?
- What client types do you serve most often?
- Do you specialize by industry or taxpayer profile?
- Do you regularly handle my state(s)?
- Do you provide proactive planning?
- Do you handle IRS representation?
- What work do you usually refer out?

Fit

- Their routine work resembles my needs
- They handle my complexity level
- They know when to refer specialized work
- Their service mix matches what I am seeking

A credential tells you the professional foundation. Practice focus tells you what they actually do.