

Tax Professional Experience Checklist

Measure relevant repetition, not just years in practice

Ask

- How long have you worked in tax?
- How long have you handled this type of issue?
- How many cases/returns like mine do you handle each year?
- When did you last handle something similar?
- Who on your team has the most relevant experience?
- What complications do you commonly see?
- What work do you refer out?

Evaluate

- Experience is recent enough for current law
- Experience is relevant to my entity / transaction / life stage
- State experience matches my jurisdictions
- Planning or representation experience is evaluated separately

Years tell you duration. Repetitions tell you exposure.