

Tax Professional Relationship Checklist

Evaluate whether the service model is workable for you

Before hiring

- Primary contact identified
- Expected response time discussed
- Year-round availability understood
- Secure document method explained
- Return review process explained
- Notice-response policy explained
- Fees and exclusions understood
- Who prepares and reviews the return is clear
- Succession / continuity approach understood

After hiring

- Communication is reliable
- Explanations are understandable
- Deadlines are clear
- Sensitive information is handled securely
- Professional accepts accountability for work
- Overall fit remains good

Technical skill matters. A good relationship makes the technical skill usable.