



## 5 Questions to Ask Before Choosing a Tax Advisor

Choosing the right tax advisor can make a major difference in how well your business handles taxes, planning, and compliance. Before hiring a professional, use this checklist to guide your decision and ensure you're working with someone qualified, transparent, and aligned with your goals.

- 1. Are you licensed or credentialed by the IRS or state?**  
Ask whether the advisor is an Enrolled Agent (EA), CPA, or other credentialed professional. You can verify their credentials through the IRS Directory of Federal Tax Return Preparers.
- 2. Do you provide tax planning, not just preparation?**  
Many preparers only focus on annual filing. A qualified advisor helps you plan throughout the year to reduce your taxes and avoid surprises.
- 3. How do you stay updated on tax law changes?**  
The IRS updates rules frequently. A professional should complete continuing education each year and stay informed through IRS bulletins or courses.
- 4. How do you integrate with bookkeeping or financial systems?**  
Tax planning works best when bookkeeping and tax services are linked. Ask how your advisor ensures your financial data stays accurate year-round.
- 5. Who will actually handle my tax work?**  
In some firms, junior staff or interns prepare returns. Confirm whether your advisor personally prepares or reviews your return for accuracy.

### Helpful IRS Resources

- 1 IRS Directory of Federal Tax Return Preparers – <https://irs.treasury.gov/rpo/rpo.jsf>
- 2 IRS Small Business and Self-Employed Tax Center – <https://www.irs.gov/businesses/small-businesses-self-employed>
- 3 IRS Publication 583: Starting a Business and Keeping Records – <https://www.irs.gov/forms-pubs/about-publication-583>

At Bridged Tax and Bookkeeping, we believe small business owners deserve transparency, strategy, and year-round guidance — not just once-a-year tax prep.