

# WHEN TO HIRE A TAX PROFESSIONAL

Save time, money, and stress with a **Tax Professional**

## Know The Signs

### ❑ No time to learn the tax code

The tax code has changed over 4,680 times since 2001.  
Non-professionals need an average of 23 hours to complete a 1040.

### ❑ Made major life changes

- ❑ Got married/divorced, had a baby, or adopted a child
- ❑ Bought or sold a home, started college, or went back to school
- ❑ Received an inheritance, started a new business, or closed a business

### ❑ Have a complex situation

- ❑ Self-employed, an independent contractor, or have a rental property
- ❑ School loans, school credits, or childcare expenses
- ❑ Investments, retirement funds, or health insurance subsidy
- ❑ No Social Security Number or victim of identity theft

### ❑ Ever thought "I wonder if I can . . ."

Software is convenient, but a **Tax Professional**

- has extensive tax training and annual certifications
- applies tax law to maximize refunds and reduce liability
- can provide assistance with any IRS tax matter