

# Tax Filing and Privacy Tips

The following are important tips to remember when preparing and filing your tax return.

- **Check out business practices.** Avoid tax preparation companies charging a percentage of the amount of the refund as part of their fee. Be sure you contact a reputable firm, and ask for their qualifications and references. Assure you have all the contact information you need for follow-up once your taxes have been prepared. Ask whether the tax preparer will represent you at a government audit.
- **Ask for information in writing** from the tax preparer relating to the total cost of service, the interest rate of any refund anticipation loan or other loan offered by the tax preparer, if you will receive a refund, and for an estimate as to how it will take to receive it.
- **Review the privacy and security policies** of professional tax preparers before considering their services.
- **Check the prepared return carefully before you submit it.** Never sign a blank or incomplete tax return or one that is not final. Remember, you - - the taxpayer - not the preparer - - are responsible for the information submitted to the federal IRS and the NY State Department of Taxation and Finance. Since you sign the form, you are responsible for the information it contains. Get a copy of every return prepared.
- **Mail your tax returns from a secure location before the last scheduled pickup time.** Never leave mail in your home mailbox for pickup by your letter carrier. Do not allow the tax preparer to mail your return.
- **When filing your taxes via the Internet, make sure your computer is free of viruses and spyware.** If your computer does not have an adequate firewall and virus protection, someone halfway around the world could access and steal your financial and personal information.
- **Keep your records in a secure place,** such as a safety deposit box or fireproof strong box. Identity theft is frequently perpetrated by family members and friends who have easy access to personal documents.
- **Shred documents containing personal information** that are no longer needed for tax filing (after the IRS record retention period expires). A cross-cut or confetti shredder will make sure that documents cannot be pasted back together.
- **Watch out for refund scams.** Fraudulent e-mails and telemarketers may ask for your bank account or credit card number, claiming they will deposit your tax refund in those accounts only to use the information to perpetrate fraud. Additionally, never allow your refund to be mailed to your tax preparer.



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