

Best Tax Practices - Report Card

WANT TO KEEP YOUR FEES LOW? This template may help understand and show what can add time to preparing your tax return. The higher your score, the lower your fees. Our base fees presume a client scoring an average of an A or a B on the report card. Use the higher number when there is more than one number to score (i.e., Appointment Timeliness would score 12 points if on time or not early by more than 15 minutes though it covers points 10, 11 & 12; take the highest number)

		A+	A	A-	B+	B	B-	C+	C	C-	D+	D	D-	F		
		12	11	10	9	8	7	6	5	4	3	2	1	0		
N/A	On time or early (not early by more than 15 minutes)	Late - NOT more than 15 minutes					Late by more than 15 min			Was a "no-show" without notice			Appointment timeliness			
N/A	YES - ALL mail had been opened before appointment; NO envelopes				ALL mail had been opened before appointment but there were envelopes				NO - 1 or more items had not been opened			Came to tax prep appointment with ALL W2's, 1099's, bank statements, etc. opened and OUT of envelopes; NO unopened envelopes				
N/A	Kept original appointment		Changed 1 time due to OTHER matter				Changed 1x due to not being ready		Changed appt 2x or more for any reason			Kept original appointment				
N/A	Yes (or did not have questions)								Questions but not written; thoughts not cohesive			Client had prepared a WRITTEN list of questions to ask				
N/A	NO								YES			During appointment, client used hand held / mobile device for things other than tax related matters				
N/A	NO								YES			Client brought in laptop, thumb drive, etc. (including hand held device), EXPECTING to extract, print, or otherwise presume the preparer wanted something from it (was not previously arranged with the preparer)				
	Came to app't / sent in with NO known missing information	Yes, but had already begun to get missing info before coming to the app't/sending in	Yes but wanted help / info from preparer about getting the missing information		Yes but I wanted to see if I really need the info first		Yes but I don't think the missing information is really important or makes a difference on my return		Yes			Came to appointment (sent in) material knowing that stuff was missing (information and or documents)				
	YES								NO (though, may have provided non-preparer provided forms)			Client filled out ALL required and necessary Organizer forms as provided/required by preparer				
	YES								Filled out SOME forms or partially filled out forms		NO			Filled out the requested & required forms, sheets, organizer, etc., PRIOR to arriving for appointment (sending in)		
	NO receipts except those were specifically told to bring / send in		Brought only a couple; did not know what they were or if they mattered; wanted 2nd opinion from preparer		3-4 receipts		5-10 receipts		More than 10 receipts			Came to appointment with (sent in) receipts that were not asked for by the preparer				
	Nothing extra than what was required to provide		Brought (sent) only a couple of things; did not know what they were or if they mattered; wanted 2nd opinion from preparer		3 items		4 items		Brought/sent in more than 5 items			Did client bring (or sent in) other things (not receipts) that were not asked for . . .				
	Did not contact		Once		Twice		3 times		4 or more			After appointment / sent material in, how many times did client initiate contact with the preparer (all forms of contact count - fax, email, phone, text, social media, etc.)				
	NO								YES			Contacted the preparer BEFORE the time the preparer said it would likely take to prepare the return				
N/A	Same day	By the end of the next business day after contact by the preparer			By the end of the 2nd business day after contact by the preparer			3 or more business days after contact by the preparer			How long did it take client to get back to the preparer with the additionally requested information (after initial appointment / sent in material, if the preparer contacted client with question(s))					
N/A	All at the same time (not in bits & pieces)								In bits & pieces over a period of time (days)			If client had to get additional material to preparer, did client provide the additional / missing material . . .				
	No problems - did not have to resubmit material				Had to resubmit material because of technical issues not related to format type				Had to resubmit material in different format			Did client have to resubmit material because it was originally presented in a wrong format (i.e., originally sent jpeg but was suppose to be PDF)?				
	Same day or the next business day		2 business days		3 business days		4 business days		5 or more business days			When client was notified that their return was complete and ready, it took client how long to schedule the pick up (provide signature documents & pay invoice)?				
	NO								YES			At some point, did the client ask one or more questions (via any form of contact) that had been PREVIOUSLY addressed in writing?				
	YES								NO			Client paid tax preparation fees/invoice without having to post-date a check or ask for time to pay				
	Gave material and allowed preparer to work as their schedule permitted		Asked for faster turnaround and was willing to pay for expedited service OR wanted faster turnaround but was okay with regular service				Asked for faster turnaround & should not have to pay extra			Expedited service						
	It is okay that the preparer reserves the right to not work harder on my taxes than I do								The preparer should work harder on my taxes than I work on my own taxes			Work harder or smarter				