CALIFORNIA TAX PREPARER / 01

MAP THE CALIFORNIA ROUTES

Record route and date only. Do not perform or copy a search in this workbook.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Engagement A / broad return-preparation objective / no tax details

Person A / neutral proposed-preparer label / no name

California FTB CTEC information route / date checked

California Board of Accountancy route / date checked

IRS federal preparer directory FAQ / date checked

Uncertain route, role, match or status question / source to ask

Preparation only. Not tax, accounting, credential, registration, filing, contract or legal advice. Do not copy public-search results.

CALIFORNIA TAX PREPARER / 02

SEPARATE PEOPLE, ROLES AND SOURCES

Tie the proposal to the actual work roles while keeping public-source notes and private engagement facts separate.

Person expected to prepare / neutral label / proposal section

Review or supervision role / neutral label / proposal section

Signing or filing role / neutral label / proposal section

Official-route observation / date / no result or interpretation

Provider explanation / written follow-up location

Secure records, later questions or representation responsibility

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CALIFORNIA TAX PREPARER / 03

CHECK THE ROUTE PACKET

Tick what is organized. These checks do not verify a person, credential, registration, service or filing position.

- [ ] Every person uses a neutral label
- [ ] Each official route has a consultation date
- [ ] Names, numbers, results and tax details remain private
- [ ] California and federal routes are kept separate
- [ ] Directory limits are treated as limits, not conclusions
- [ ] Provider statements are separate from official-source notes
- [ ] Preparation, review, signing and follow-up roles are visible
- [ ] Uncertain points remain questions for the proper source

California route or public-source question still open

Preparer, reviewer, signer or follow-up role still unclear

Missing secure-workflow, scope, exclusion or written-term detail

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CALIFORNIA TAX PREPARER / 04

QUESTIONS FOR THE TAX PREPARER

Record only non-sensitive answers and where they appear in the proposal or engagement terms.

People: who prepares, reviews and signs, and what is each role?

Routes: which California or federal source relates to the public question?

Clarification: who can address a match, absence or status-label question?

Security: how are records, messages, signatures, returns and copies handled?

Scope: what preparation, filing and later support is included or separate?

Terms: where are responsibilities, timing, complete fees and exclusions written?

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CALIFORNIA TAX PREPARER / 05

COMPARE ROLE AND ROUTE CLARITY

Use Provider A and B. Clarify unlike people, routes or service assumptions before comparing proposals.

Provider A / B / proposed-person labels / proposal dates

Preparation, review, signing and public-route clarity - A / B

Secure exchange, communication, filing and later support - A / B

Scope, responsibilities, complete fees, exclusions and open questions - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start a Tax Preparation request. Share a non-sensitive engagement, role and official-route brief so participating pros can compete with proposals. Compare relevant qualifications, who performs each task, secure workflow, scope, communication, written terms, exclusions and fit. Never include tax identifiers, financial figures, notices, returns or documents in the request.

One request. Every pro's best offer.

Start a request

Participation varies. A private engagement, secure-record and official-route clarification conversation may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/tax-preparation

California Franchise Tax Board: Registered tax preparers and CTEC (official reference)

California Board of Accountancy (official reference)

Internal Revenue Service: Federal preparer directory FAQ (official reference)

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