INDIVIDUAL TAX RETURNS / 01

BUILD A NON-SENSITIVE RETURN BRIEF

Give each preparer the same high-level context. Keep tax documents and sensitive personal and financial data private.

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

Tax year or years, filing context and project contact - no Social Security numbers or account data

High-level income and source categories only - no amounts, payer details, documents or account information

Major life, work, business, housing or family changes for professional review - no status determination

States, countries or locations that may need preparer assessment - no residency or filing decision

Record-category readiness and prior-return availability through a provider-approved secure channel

Known timing concerns, private notices and open questions to discuss securely with the preparer

Preparation only. Not tax, accounting or legal advice; no filing-status, form, treatment, deduction, credit, position, deadline, jurisdiction, liability, refund or outcome determination. Never enter sensitive personal or financial data.

INDIVIDUAL TAX RETURNS / 02

MAP THE ENGAGEMENT AND SECURE WORKFLOW

Compare qualifications, scope and process before sharing private records.

Preparer type, credentials, qualifications and experience questions relevant to this engagement

Representation, later-question, notice, amendment and follow-up scope included or excluded

Written engagement inclusions, exclusions, client responsibilities and items that change scope

Secure document exchange, message, signature, access, retention, copy and return-delivery methods

Preparation, missing-item, question, review, approval and filing-authorization workflow

Status updates, decision points, timing concerns and items that require client or professional action

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INDIVIDUAL TAX RETURNS / 03

PREPARE RECORDS, REVIEW AND HANDOFF

Tick what is ready, then keep all private records inside the preparer's secure process.

- [ ] The workbook contains no Social Security, account or tax-document data
- [ ] Tax year or years and filing context are stated at a high level
- [ ] Income and record categories are listed without amounts or payer details
- [ ] Life, work and location changes are flagged for professional review
- [ ] Possible jurisdictions are listed without a client determination
- [ ] A provider-approved secure exchange method will be used
- [ ] Preparer credentials, qualifications and engagement scope will be checked
- [ ] Review, authorization, copies and later follow-up are included

Category-level document inventory, missing-item owner and secure delivery status - no documents here

Review questions, client decisions, approval, authorization, completed-return copy and delivery process

After-filing questions, records, notices, amendments, billing, open items and follow-up ownership

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INDIVIDUAL TAX RETURNS / 04

QUESTIONS FOR AN INDIVIDUAL TAX PREPARER

Record how each preparer would scope, secure, prepare, review, file and support the same non-sensitive brief.

Qualifications: what preparer type, credentials and experience apply, and how can they be confirmed?

Scope: what is included, excluded or separately scoped, and what responsibilities belong to the client?

Security: how will private records, messages, signatures, returns and copies be exchanged and stored?

Workflow: how are missing items, questions, preparation, review, approval and authorization handled?

Professional review: how will you assess forms, treatment, positions and jurisdictions from private records?

Follow-up: what later-question, notice, amendment, copy and representation support is included?

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INDIVIDUAL TAX RETURNS / 05

COMPARE THE SAME INDIVIDUAL RETURN BRIEF

Use A and B in every box. Compare qualifications, scope and secure workflow before sharing private records.

Preparer A / Preparer B / proposal dates and the shared tax-year and non-sensitive filing brief

Preparer type, credentials, qualifications, engagement inclusions, exclusions and responsibilities - A / B

Secure exchange, preparation, questions, review, approval, authorization and delivery workflow - A / B

Complete proposal, timing, copies, later questions, notices, amendments, support and open items - 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 tax-year, filing-context, income-category, life-change, location and record-readiness brief so participating pros can compete with proposals. Compare qualifications, scope, secure exchange, review, filing authorization, follow-up, timing and fit. Never post tax documents or sensitive personal or financial data.

One request. Every pro's best offer.

Start a request

Participation varies. A secure tax-year, filing-context and record-category review may be needed before a final engagement proposal.

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

Internal Revenue Service: Choosing a tax professional (official reference)

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