TAX PREPARATION / 01

MAP THE ENGAGEMENT

Use general descriptions only. Keep sensitive identifiers off this worksheet.

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

Tax year or years I want to discuss

Return types or entities in general terms

States, countries, or other jurisdictions to discuss

Prior filings, extensions, notices, or amended-return questions in general terms

Major life, work, property, or business changes to mention

My three priorities for the first conversation

TAX PREPARATION / 02

ORGANIZE RECORD CATEGORIES

Mark categories ready, incomplete, missing, or not sure. Do not copy private numbers.

Income document categories / status / missing item

Business or self-employment record categories / status

Property, rental, investment, or digital-asset record categories / status

Potential credit or deduction record categories to ask about

Prior return, payment, notice, or authorization records available

Corrected, duplicate, or late-arriving document questions

Preparation only. Not tax advice. Keep sensitive identifiers off this worksheet.

TAX PREPARATION / 03

BEFORE SHARING DOCUMENTS

Confirm the preparer's process before transmitting sensitive information.

- [ ] Years, return types, entities, and jurisdictions are listed
- [ ] Record categories are grouped without sensitive identifiers
- [ ] Missing and corrected documents are clearly noted
- [ ] A tailored document request has been requested or received
- [ ] The secure document-transfer method is confirmed
- [ ] Preparation, review, signing, and filing responsibilities are clear
- [ ] Communication and approval steps for open questions are understood
- [ ] I will keep final returns and confirmations in my own secure files

Tailored document request / missing records / person responsible

Secure sharing method / access contact / retention question

Meeting date / preparation timeline / next checkpoint

Preparation only. Not tax advice. Keep sensitive identifiers off this worksheet.

TAX PREPARATION / 04

QUESTIONS FOR THE TAX PREPARER

Write down what the professional confirms about this engagement.

Coverage: which years, returns, entities, and jurisdictions are included?

Records: what is needed, missing, or subject to clarification?

Security: how should sensitive records be transferred and accessed?

Team: who prepares, reviews, communicates, and signs?

Follow-up: what is included after preparation or filing?

Terms: timing, written fees, client duties, and exclusions?

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TAX PREPARATION / 05

COMPARE THE ENGAGEMENT

Use A and B in every box. Compare the same requested work.

Professional A / Professional B / consultation dates

Years, returns, jurisdictions, and included services - A / B

Team, secure sharing, communication, timing, and follow-up - A / B

Written fee terms, exclusions, client responsibilities, and open questions - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai and start a tax preparation request. Describe the years, return types, entities, and general record readiness so participating pros can compete for your business with proposals. Compare professional fit, engagement scope, secure sharing, timing, and written fee terms.

One request. Every pro's best offer.

Start a request

Participation varies. A consultation and secure record review may be needed before a final engagement proposal.

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

IRS: Gather your documents (official reference)

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