

ACCREDITED TAX ADVISOR



Accredited Tax Advisor (ATA) credential holders made a voluntary choice to earn them, showing their ongoing commitment to continuing professional education and quality client service. Professional credentials demonstrate higher national standards; a mastery of accounting and taxation, principles, procedures and practices; and professional knowledge.

The ATA is a leading national credential for practitioners who handle sophisticated tax planning issues, including planning for owners of closely held businesses, planning for the highly compensated, choosing qualified retirement plans and performing estate tax planning. Their expertise covers tax returns for individuals, business entities, fiduciaries, trusts and estates, as well as tax planning, tax consulting and ethics.

To earn the ATA credential, candidates must pass a rigorous exam, as well as have three (3) years of related work experience.

ATA Credential Holders:

- Earned their credential(s) by examination
- Committed to ongoing professional education
- Adhere to a Code of Ethics

Choosing a Tax and Accounting Professional

Most people would never hire a doctor, dentist, or lawyer without proven credentials. It shouldn't be any different for tax preparers and accountants.

About ACAT

The Accreditation Council for Accountancy and Taxation® (ACAT) is a non-profit independent testing, accrediting and monitoring organization. Professionals receive accreditation through examination and maintain their accreditation through commitment to a significant program of continuing professional education and adherence to the Council's Code of Ethics and Rules of Professional Conduct.

ACAT programs are governed by a Board of Directors that includes practitioners, educators and a public member.



Tips for Hiring a Tax Professional

- Check the preparer's qualifications
- Check the preparer's history
- Ask about service fees
- Ask to e-file
- Make sure the preparer is available
- Provide records and receipts
- Never sign a blank return
- Review before signing
- Ensure the preparer signs and includes their PTIN
- Report abusive Tax Preparers to the IRS