



Sample Email Response for Out-of-Scope - Referrals:

Hello,

I'm sorry, but your return is out of scope for our services. I recommend you seek a Tax Professional to prepare your return.

A Tax Professional is someone who you can have a longstanding professional relationship with. They can work with your constraints, understand your financial situation with compassion, and consult with you in regards to complicated tax situations.

Due to IRS regulations, we cannot refer a specific professional to you. You can seek out a CPA or an EA.

An Enrolled Agent (EA) is a tax professional who has received a credential from the IRS. EAs can prepare all kinds of tax returns and they can represent you before the IRS, if needed. An EA might also be a suitable choice if you have long-standing issues with the IRS.

A Certified Public Accountant (CPA) is someone who can focus on a lot of different Accounting tasks such as Bookkeeping, Auditing, Payroll, and Taxes. Therefore, a CPA might be ideal if you have a business you would like to keep supported over several years.

We can guide you to the following three websites:

*<https://irs.treasury.gov/rpo/rpo.jsf> - This website has a list of all tax preparing professionals.

* naea.org - The National Association of Enrolled Agents (NAEA) has a handy tool to search for an Enrolled Agent (EA) near you.

*wscpa.org - The Washington State Certified Public Accountants (WSCPAs) has a wide range of Certified Public Accountants (CPAs) who can prepare taxes for you.

You can use any of the websites provided and search for a professional by Zip code. Tax Professionals will either charge per the tax form, or per the hour. Some might even do it Pro Bono. Staying organized, and responsive to emails, will ensure the Tax Professional will want to keep you as a long term client. A lot of Tax Professionals will only have the capacity to file an extension for you right now.

Chat it out with them, and see which one works best for you.

Let us know if you have any questions.