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A new survey conducted by the [National Association of Enrolled Agents](#) (NAEA) reveals best practices that enrolled agents, federally-licensed tax experts, believe clients should follow in order to get the best outcome from their work with a tax professional. The online survey presented a series of statements and asked NAEA members to choose the one to five statements with which they agreed most strongly. The statements were grouped into three broad categories: Organization (how clients should organize their tax documents), Communication (preferred methods and timing), and Professionalism (helpful “dos and don’ts” when working with a tax pro).

### **Better Organization Pays Off**

Enrolled agents understand that many Americans, especially those working with a tax practitioner for the first time, need help organizing their tax documents. Twenty percent of those surveyed strongly agreed with the notion that ALL clients should sort their documents using the organizer or organizing system provided by their tax professional, while 21 percent feel “It is impractical to expect new clients to organize their materials using the system with which I am most comfortable.”

However, 47 percent strongly agreed with the following statement: “I work more effectively with clients who are willing to learn and adjust the way they organize their documents so that I can serve them better.” More than half (51 percent) strongly agree that taxpayers should schedule an appointment with their tax professional early in the filing season to avoid a range of undesirable outcomes.

Following are the three top statements in the “Organization” category that respondents agreed with most strongly:

“Your willingness to adapt the way you organize your tax documents will help you

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### **Remember, We're Professionals**

Like lawyers or doctors, enrolled agents are not eager to discuss your individual predicament outside of a phone call or appointment set up for that purpose. Additionally, below are five important statements enrolled agents agree with strongly, and that are important for clients to understand in order to establish a productive, professional working relationship with their tax advisor:

“Even if you've never worked with a tax professional before, I encourage you to find a federally-licensed enrolled agent in your area today by using the free ‘Find a Tax Expert’ directory at [www.eaTax.org](http://www.eaTax.org),” Adelman added. “Enrolled agents can provide clarity around the impact of the new tax laws, ensure your taxes are handled properly, and serve as your advocate in any dealings with the IRS.”

### **Survey Methodology**

The National Association of Enrolled Agents conducted an online survey of its members between January 9, 2018 and January 24, 2018. The survey yielded responses from 1,423 NAEA members, all enrolled agents, 63 percent of whom have more than 20 years of professional experience preparing and filing taxes. [Click here to view full survey findings.](#)

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