

Submitter: Lonnie Clark
On Behalf Of:
Committee: House Committee On Revenue
Measure, Appointment or Topic: SB1510

I support 1510A that allows enrolled agents who are licensed by the IRS to hire staff who are not licensed tax preparers and to end the double reporting of continuing education to both the IRS and the state.

The requirement to hire only licensed tax preparers has prevented me from growing my business because I am a one person business, and it has been impossible for me to comply DOR rules of hiring licensed tax preparers.

I cannot hire a non licensed tax preparer to work as a trainee to compile draft returns, or assist with tax prep any way, even though I have gotten my client's permission to allow my employee to view, discuss or assist in preparing their tax returns, because according to my understanding of Oregon tax preparer rules, my office assistant is not allowed to print out a tax return or compile a tax return for my review. My understanding of DOR rules, only licensed tax preparers can do that.

My business is unique. I help people with severe tax problems, and almost all of them are behind in their tax filings. Finding an employee who is willing to work with people with severe tax problems is difficult, made only worse by the restrictions to Enrolled Agents by DOR tax preparer licensing rules.

The confusing part of the tax preparer's rules set out by DOR is that they only pertain to personal tax returns, which are far less complicated, yet anyone can prepare any corporate, partnership or trust returns, which have a greater chance of being incorrectly prepared or even maliciously in error to avoid taxation.

I was told by DOR that these rules were more about consumer protection than accuracy of all types of tax returns.

If I had lived in a different state, I would have been allowed to grow my business. In Oregon because of the strict rules regarding enrolled agents and tax preparation, I cannot bring in an assistant that helps me with tax resolution or an unlicensed office assistant to help with the workflow of tax season.

Thank you for your consideration and approval of this bill, which will allow enrolled agents to grow their businesses in Oregon.

