

Ten Tips to Help You Choose a Tax Preparer



As part of our blog series on tax literacy, MBDA will highlight the latest tax-related news issued by the IRS for business owners. The material presented in this website is not offered as legal or tax advice. You are urged to seek the advice of your tax advisor, attorney, and/or financial planner for any issue related to tax obligations.

This post originally appeared as a IRS Tax Tip

Many people look for help from professionals when it's time to file their tax return. If you use a paid tax preparer to file your federal income tax return this year, the IRS urges you to choose that preparer carefully. Even if someone else prepares your return, you are legally responsible for what is on it.

Here are ten tips to keep in mind when choosing a tax return preparer:

Check the preparer's qualifications. All paid tax return preparers are required to have a Preparer Tax Identification Number. In addition to making sure they have a PTIN, ask if the preparer belongs to a professional organization and attends continuing education classes.

Check on the preparer's history. Check with the Better Business Bureau to see if the preparer has a questionable history. Also check for any disciplinary actions and for the status of their licenses. For certified public accountants, check with the state boards of accountancy. For attorneys, check with the state bar associations. For enrolled agents, check with the IRS Office of Enrollment.

Ask about service fees. Avoid preparers who base their fee on a percentage of your refund or those who claim they can obtain larger refunds than other preparers can. Also, always make sure any refund due is sent to you or deposited into an account in your name. Taxpayers should not deposit their refund into a preparer's bank account.

Ask to e-file your return. Make sure your preparer offers IRS e-file. Any paid preparer who prepares and files more than 10 returns for clients must file the returns electronically, unless the client opts to file a paper return. IRS has safely and securely processed more than one billion individual tax returns since the debut of electronic filing in 1990.

Make sure the preparer is accessible. Make sure you will be able to contact the tax preparer after you file your return, even after the April 15 due date. This may be helpful in the event questions arise about your tax return.

Provide records and receipts. Reputable preparers will request to see your records and receipts. They will ask you questions to determine your total income and your qualifications for deductions, credits and other items. Do not use a preparer who is willing to e-file your return by using your last pay stub before you receive your Form W-2. This is against IRS e-file rules.

Never sign a blank return. Avoid tax preparers that ask you to sign a blank tax form.

Review the entire return before signing. Before you sign your tax return, review it and ask questions. Make sure you understand everything and are comfortable with the accuracy of the return before you sign it.

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SMALL BUSINESS EXCHANGE

SBE OUTREACH SERVICES

With half a million businesses in our database, SBE is California's #1 source for diversity outreach.

Advertisements

Placed in the Small Business Exchange newspaper, SBE Today newsletter, and online at www.sbeinc.com

Faxed Solicitations

Targeted mailings sent to businesses per your criteria.

Telemarketing

Telephone follow-up calls that follow a script of 5 questions you create.

Computer Generated Reports

Will fit right into your proposal, along with a list of interested firms to contact.

Call Toll FREE for more information: 800-800-8534

BIDDING OPPORTUNITIES

Candlestick Point in San Francisco Opportunity to Perform

DEMOLITION, MASS GRADING & SURCHARGE during the development of CANDLESTICK POINT in San Francisco.

Lennar Urban is requesting qualified, interested construction firms to respond to a public request for proposals to perform demolition, mass grading and surcharge services for Candlestick Point Redevelopment Subphase CP-01 Stage 1

For more information, please visit:

<http://mission.sfgov.org/OCABidPublication/BidDetail.aspx?K=7694>

The Successor to the San Francisco Redevelopment Agency (SFRA) has established the 50% Small Business Enterprise (SBE) Participation goal for Construction Subcontracting.

Respondents are encouraged to check this website regularly for updates.

Pre-Bid Coordination Meeting
and Job Walk:

February 18th at 10:00 AM
Building 101
101 Horne Ave.

Hunters Point Shipyard
San Francisco, Ca 94124

Proposals must be submitted by
March 4, 2014

TAFT ELECTRIC COMPANY,
1694 EASTMAN AVENUE, VENTURA, CA 93003
Contact: Tim Herrera

Phone: (805) 642-0121 • Fax: (805) 650-9015

Invites sub-bids from qualified union DBE businesses for the following project:

Contract # 07-292504

**Construction on State Highway in
Ventura County in Thousand Oaks at
Lynn Road Overcrossing**

**LOCATION: State Highway in Ventura County
in Thousand Oaks at Lynn Rd. Overcrossing**
APPROXIMATE PROJECT VALUE: \$310,000

BID DATE/TIME: 2/20/14 @ 2:00pm

SEEKING: Lead Compliance, Construction Signage, Traffic Control System, Water Pollution Control Program, Drainage Inlet Protection, Concrete washout, Roadway Excavation, Class 3 Aggregate Base CY, Lean Concrete Base, Detectable warning Surface, Minor Concrete (Curb, Curb Ramp, and Gutter), Interconnection Conduit and Cable (LS), Modify Signal and Lighting and Landscape.

We are an Equal Opportunity Employer and intend to seriously negotiate with qualified Disabled Veteran Business Enterprise subcontractors and suppliers for project participation.

Payment and performance bonds may be required. Please contact us at the above listed number for further information regarding bidding on this project. To the best of our abilities we will help with bonds/insurance/credit. Plans are available for viewing at our office.

We Are An Equal Opportunity Employer

WE ARE REQUESTING QUOTATIONS FROM ALL QUALIFIED MBE/DBE/WBE/DVBE SUBCONTRACTORS AND MATERIAL SUPPLIERS FOR THE FOLLOWING PROJECT:

**Lowell High School Units 4 & 5, Voluntary
Seismic Strengthening
SFUSD Project No. 11493**

**BID DATE & TIME: Bid Due:
February 18, 2014 2:00 p.m.**

The project scope includes, but is not limited to, seismic strengthening, minor remodeling, replacement of floor finishes, demolition & reconstruction of walls/floors/ceilings/doors/cabinets/roofing, demolition & reconstruction of mechanical and electrical systems to Building Units 4 and 5, landscaping adjacent to Unit 5, installation and utility hookup for seven (7) interim housing units and hazardous material abatement.

Bids shall be made in accordance with the prevailing wages for the work in San Francisco County. LBE, SBE, WBE, DVBE, LEED Goals.

(The Specifications and Plans will be available in our office 8:30AM – 5PM or at ARC Northern California – Bid Services – 945 Bryant Street, San Francisco, CA 94103.

Contact Priyantha De Pinto: 415-537-2235
Fax: 415-348-0684, email: sf@e-arc.com).

Transworld Construction Inc.

1178 Folsom Street • San Francisco, CA 94103

Phone: (415) 626-5500 • FAX: (415) 863-3578

Contact: Paul Hess at ext. 112

WE ARE
AN EQUAL OPPORTUNITY EMPLOYER

Request for quotes from WBE/DBE/MBE Paving and Electrical subcontractors.

**Interceptor LMS-5/S3 Enclosure Relocation
Project No. SD-353**

Location: Alameda County

Bid Date: 2/5/2014 @ 1.30pm

Ranger Pipelines Inc.

P.O. Box 24109 • San Francisco, CA 94124

Phone: 415-822-3700 • Fax: 415-822-3703

Contact: Daire O'Rourke

Email: daire@rangerpipelines.com

Treasure Island / Yerba Buena Island – Opportunity to Provide Shoreline Engineering Consultant Services

Treasure Island Community Development, (TICD), master developer of the Treasure Island / Yerba Buena Island Redevelopment Project is requesting qualified, interested shoreline engineering firms to respond to a request for proposals. Information is available through the City and County of San Francisco's Treasure Island Development Authority (TIDA) website:

www.sftreasureisland.org/contracting

Respondents are encouraged to check this website regularly for updates.

Proposals must be submitted by
February 6, 2014.



A Joint Venture in Association with LAN | TY Lin

Procurement opportunities through Skanska-Shimmick-Herzog will be diverse and ongoing.

Please visit: www.sshjv-c700.com

frequently to see procurement opportunities and project contacts in the Bid Packages folder. Plans, specs, drawings, etc. can be found on the procurement web site.

EEO

Santa Clara Valley Transportation Authority Design-Build Contract DB1102F Silicon Valley Berryessa Extension Project C700



in association with AECOM

I-805 North Improvement Design Build Project Caltrans Contract No: 11-2T2004

Current and ongoing procurement opportunities for the I-805 North project are available through the project procurement website: www.usa.skanska.com/I805North

Bid Packages available are: Soil Nail Walls

Bid packages will be posted to the site on a continual basis. Plans, Specs and additional information are also available on the site. If you need assistance, please contact Dave Sharpnack at 951-295-3140. UDBE and Non-UDBE subs are encouraged to participate.

Skanska is an Equal Opportunity Employer

BIDDING OPPORTUNITIES

AMOROSO construction

S. J. AMOROSO CONSTRUCTION CO., INC. IS REQUESTING QUOTATIONS FROM ALL DVBE SUBCONTRACTORS AND SUPPLIERS FOR ALL TRADES FOR THE FOLLOWING PROJECT:

Project: Burton High School Modernization
Location: San Francisco, CA
Project Number: 11504
Owner: San Francisco Unified School District
Bid Date: 2/11/14 @ 2:00 PM
Please submit Bid by: 2/11/14 @ 1:30 PM
Engineer's Estimate: \$21,375,000
Contact: Jim Benson

S.J. Amoroso Construction Co., Inc.
 390 Bridge Parkway, Redwood Shores, CA 94065
 650-654-1900 / 650-654-9002
www.sjamoroso.com

The Project is generally described as: General School Modernization and reconstruction including ADA Access and Fire/Life-Safety upgrades, including but not limited to interior and exterior painting at affected areas, new lift, miscellaneous site work, hazardous material/Asbestos remediation and other misc. interior renovation work. The Estimated construction value of the work is \$21,375,000. All Bidders are hereby notified that the District has a Project Labor Agreement (PLA) in effect on the Project and all contractors and subcontractors bidding this project will be required to comply with the PLA. All General Contractors and Fire Protection, Mechanical, Electrical and Plumbing Subcontractors must be prequalified in order to bid on this project.

Trades to be subcontracted are: Earthwork, Utilities, Asphalt Paving, Concrete Pavement, Pavement Markings, Irrigation & Landscape, Fencing, Concrete Reinforcement, Cast-In-Place Concrete, GFRG Column Covers, Fiber-Reinforced Polymer Composite System, Structural Steel, Steel Deck, Metal Framing, Metal Fabrications, Rough Carpentry, Finish Carpentry, Architectural Cabinets, Formed Metal Roof Panels, Built-Up Bituminous Roofing, Sheet Metal Flashing and Trim, Joint Sealants, Doors and Frames, Coiling Counter Doors, Aluminum-Framed Entrances and Storefronts, Aluminum Windows, Door Hardware, Glazing, Aluminum Curtain Wall, Translucent Skylights, Plaster, Gypsum Board, Ceramic Tile, Acoustical Ceilings, Flooring, Epoxy Flooring, Acoustical Wall Panels, Toilet Compartments and Accessories, Corner Guards, Signage, Metal Lockers, Stage Curtains, Projection Screens, Floor Mats and Frames, Roller Window Shades, Auditorium Seating, Fire Alarm System, Wet Pipe Sprinkler System, Upgrade of Elevator, Vertical Lifts, Evacuation Chairs, Plumbing, HVAC and Electrical.

We are willing to break out certain portions of work into smaller increments in order to allow smaller companies a fair opportunity to bid this project and are prepared to assist subcontractors with bonding, credit, and insurance. Plans are available for viewing in our plan room as well as many local builders exchanges including (for a list of the exact location of builders exchanges contact our office). Bid and Contract Documents are available at ARC, 945 Bryant St., San Francisco, CA 94103, phone: 415-537-2235, fax: 415-348-0684, for a \$100.00 non-refundable fee. Bidder is responsible for all shipping and handling fees. Plans are available for viewing at https://order.e-arc.com/arcEOC/PWELL_Main.asp?mem=23.

Please review the general requirements for special insurance and other requirements. If you need assistance regarding bonds or insurance, please feel free to contact us. 100% Payment / Performance Bonds may be required from S.J. Amoroso approved sureties. S.J. Amoroso is signatory to the Carpenter's, Laborer's, and Cement Mason's Collective Bargaining Agreements. Successful subcontractors will be expected to execute a standard S.J. Amoroso subcontract agreement and comply with S.J. Amoroso's standard insurance requirements. These requirements are available for viewing on our website at <http://www.sjamoroso.com/bidcenter.asp>. Worker's Compensation Waiver of Subrogation will be required. GC will pay up to 1 1/2% bond premium.

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Treasure Island / Yerba Buena Island – Opportunity to Provide Civil Engineering Consultant Services

Treasure Island Community Development, (TICD), master developer of the Treasure Island / Yerba Buena Island Redevelopment Project is requesting qualified, interested civil engineering firms to respond to a request for proposals. Information is available through the City and County of San Francisco's Treasure Island Development Authority (TIDA) website: www.sftreasureisland.org/contracting

Respondents are encouraged to check this website regularly for updates.

Proposals must be submitted by
February 6, 2014.

Treasure Island / Yerba Buena Island – Opportunity to Provide Landscape Architect Consultant Services

Treasure Island Community Development, (TICD), master developer of the Treasure Island / Yerba Buena Island Redevelopment Project is requesting qualified, interested landscape architecture design firms to respond to a request for proposals. Information is available through the City and County of San Francisco's Treasure Island Development Authority (TIDA) website: www.sftreasureisland.org/contracting

Respondents are encouraged to check this website regularly for updates.

Proposals must be submitted by
February 6, 2014.

Sub-Bids Requested From WBE, MBE, DBE
Subcontractors & Suppliers for:

Joint Intake and Fish Screen Project
Owner: Reclamation District 2035
Location: Woodland, CA

Bid Date: 3/5/2014 @ 2:00 PM

TRADES: SUBS: Clearing, Sealants & Caulking, Reinforced Steel, Metal Framing, Demolition, Hoists & Cranes, Dewatering, Perforated Metal Wall Panels, Trucking, Paving, Erosion Control, Electrical & Instrumentation, Fencing, PVC Membrane Roofing, Painting & Coatings, Masonry, HVAC/Flashing & Sheet Metal, Steel Joists, Landscape & Irrigation, Geomembrane Lining, Metal Decking, Domestic Well System, Surveying, Bore & Jacking (Trenchless Technology)

MATERIALS & SUPPLIERS: Aggregates, Pipe Pile, Concrete, Mechanical Equipment, Manholes, Hatches, Aluminum Handrail, Rough Carpentry, Doors & Windows, Sheet Pile, Sluice and Slide Gates, Piping, Valves & Accessories, Misc Metals & Structural Steel.

SYBLON REID

P.O. BOX 100 • Folsom, CA 95763
 Phone: (916) 351-0457 • Fax: (916) 351-1674
 Contact: Karen Reichenberger

If a portion of the work is too large for you to handle, contact us and we will try and break it into smaller portions

Plans and specs are available for review at Syblon Reid office and upon request will provide assistance with drawings and specifications.

Subcontractors and suppliers must be licensed to conduct business in the state of California. Must be able to provide payment and performance bonds provided by approved surety company. SRC will pay bond premium up to 1.5% of subcontract amount and will assist with insurance compliance. SRC will work with subcontractors on joint check agreements. Plans and specs are available for viewing at our Folsom office and upon request will provide assistance with plans and specifications or help meet other requirements.

REQUEST FOR QUALIFIED
DVBE/SBE/MBE/LBE
SUBCONTRACTORS & SUPPLIERS
FOR:

**PRESIDIO MIDDLE SCHOOL
BOILER REPLACEMENT
SAN FRANCISCO UNIFIED SCHOOL DISTRICT
PROJECT # 11514**

BID DATE: February 6, 2014 / 2:00 p.m.

Bonding May Be Required

Cornely Company

1127 Mission Street • San Francisco, CA 94103
 Phone: (415) 252-1800 • Fax: (415) 252-1818

Contact: Kevin Gray

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PUBLIC LEGAL ADVERTISEMENTS



CITY & COUNTY OF SAN FRANCISCO DEPARTMENT OF PUBLIC WORKS

Contract No. JOC-J23(R) (ID No. JCC14023) JOB ORDER CONTRACT NO. J23 GENERAL BUILDING SERVICES (REBID)

Sealed bids will be received at 1155 Market Street, 4th Flr, SF, CA 94103 until **2:30 p.m. on February 26, 2014**, after which they will be publicly opened and read. Digital files of Bid Documents, Plan Holders Lists, and Addenda may be downloaded at no cost from the Department of Public Works (DPW) Electronic Bid Documents Download site at www.sfdpw.org/biddocs, or obtained on a CD format from 1155 Market St., 4th Flr, SF, CA 94103, telephone 415-554-6229, at no cost. Please visit the DPW's Contracts, Bid Opportunities and Payments webpage at www.sfdpw.org for more information. Notices regarding Addenda and other bid changes will be distributed by email to Plan Holders.

The advertisement for bids is for the award of a Job Order Contract (JOC). Work is accomplished by issuing Task Orders to the successful contractor during the term of the contract. The scope of work may include repair, alteration, modernization, maintenance, rehabilitation, demolition and construction of infrastructure, infrastructure, buildings, structures, or other real property.

The Contract Term is 3 years from the date of notification to Contractor of executed Contract or when the cumulative amount of issued Task Orders reaches the Maximum Contract Value, whichever comes first. The Contract Term may be extended for additional 2 years to complete the work of issued Task Orders, but no new Task

Orders will be issued after the first 3 years.

The Maximum Contract Value is \$3,000,000, with a minimum of \$50,000 worth of Task Order(s) to be issued during the Contract Term. For more information, contact the JOC Manager, Jason Chin at 415-558-4420.

Bids will not be accepted from contractors currently holding a JOC contract with the Department of Public Works, except when such existing JOC contract will expire in 120 days or fewer from the date Bids are due for this Contract, or if the contractor has performed work valued by the City in an amount equal to or exceeding 90% of the maximum dollar amount of the existing JOC contract.

Pursuant to San Francisco Administrative Code (SFAC) Section 6.25, "Clean Construction" is required for the performance of all work.

Each Task Order will include liquidated damages, and each Task Order will be on a Lump Sum basis computed using pre-set unit prices and the Adjustment Factors. Progressive payments will be made on Task Orders with construction duration of more than 45 calendar days.

Bid discounts may be applied as per SFAC Chapter 14B. Subcontracting goal is **25% LBE**. Call Romulus Asenloo at 415-581-2321 for details. In accordance with SFAC Chapter 14B requirements, all bidders, except those who meet the exception noted below, shall submit documented good faith efforts with their bids and must achieve 80 out of 100 points to be deemed responsive. Bidders will receive 15 points for attending the pre-bid conference (Bidders who attended the pre-bid conference for the original bid can use that attendance to receive 15 points on this rebid). Refer to CMD Form 2B for more details. Exception: Bidders who demonstrate that their total LBE participation exceeds the above subcontracting goal by 35% will not be required to meet the good faith efforts requirements.

A pre-bid conference will be held **February 11, 2014, at 1:30 p.m.**, at 30 Van Ness Avenue, 5th Floor Main Conference Room. Bidders are strongly encouraged to attend to obtain information regarding the Job Order Contract program.

For information on the City's Surety Bond Program, call Jennifer Elmore at (415) 217-6578.

A corporate surety bond or certified check for no less than \$150,000, an amount equal to ten percent (10%) of the Initial Performance Bond and Initial Payment Bond amount of \$1,500,000, must accompany each bid.

Class "B" license required to bid.

In accordance with SFAC Chapter 6, no bid is accepted and no contract in excess of \$400,000 is awarded by the City and County of San Francisco until such time as the Mayor or the Mayor's designee approves the contract for award, and the Director of Public Works then issues an order of award. Pursuant to Charter Section 3.105, all contract awards are subject to certification by the Controller as to the availability of funds.

Minimum wage rates for this project must comply with the current General Prevailing Wage as determined by the State Department of Industrial Relations. Minimum wage rates other than applicable to General Prevailing Wage must comply with SFAC Chapter 12P, Minimum Compensation Ordinance.

This Project is subject to the requirements of the San Francisco Local Hiring Policy for Construction ("Policy") as set forth in Section 6.22(G) of the SFAC. Bidders are hereby advised that the requirements of the Policy will be incorporated as a material term of any contract awarded for the Project. Refer to Section 00 73 30 of the Project Manual for more information.

Right reserved to reject any or all bids and waive any minor irregularities.

CNS-2583448#
SMALL BUSINESS EXCHANGE

BIDDING OPPORTUNITIES

RGW Construction Inc. is seeking all qualified DBE (Disadvantaged Business Enterprises) for the following project:

State Highway in Santa Cruz County Near Scotts Valley from 0.3 Mile North of Glenwood Cutoff to 0.5 Mile South of Glenwood Drive

Contract No05-1C1804 Federal Aid Project ACHSNHP-P017(108)E

Engineer Estimate \$2,910,000 - 245 Working Days

Goal: DBE 5%

Bids: February 12, 2014 @ 2:00 PM

Requesting Sub-quotes for (including but not limited to): Cold Plane, Drilling, Rebar, Slope Protection, Striping & Markers, Trucking, Concrete Barrier, Demolition, Fabric & Oils, Guard Railing, Signs-Roadside, Traffic Control, Underground, Soil Nails, & Shotcrete.

Scope of Work: Widen shoulder and construct soil nail wall.

RGW is willing to breakout any portion of work to encourage DBE participation. Contact us for a specific item list.

Plans and Specs are available to view and copy at our office or the Caltrans website www.dot.ca.gov/hq/esc/oe/. Contact John Pitsch at 925-606-2400, or e-mail johnp@rgwconstruction.com for any questions, including bonding, lines of credit, or insurance or equipment or material suppliers. Subcontractors should be prepared to submit payment and performance bonds equal to 100% of their quotation. For bonding and other assistance, please call.

RGW Construction, Inc.

Contractors License A/B 591940

550 Greenville Road • Livermore, CA 94550 • Phone: 925-606-2400 • Fax: 925-961-1925

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Choose a Tax Preparer

■ Continued from page 1

Make sure the preparer signs and includes their PTIN. A paid preparer must sign the return and include their PTIN as required by law. The preparer must also give you a copy of the return.

Report abusive tax preparers to the IRS. You can report abusive tax preparers and suspected tax fraud to the IRS on Form 14157, Complaint: Tax Return Preparer. If you suspect a return preparer filed or altered a return without your consent, you should also file Form 14157-A, Return Preparer Fraud or Misconduct Affidavit. Download the forms on the IRS.gov website or order them by mail at 800-TAX-FORM (800-829-3676).

Website: <http://www.mbda.gov/blogger/tax-literacy/ten-tips-help-you-choose-tax-preparer>

Source: The Minority Business Development Agency (MBDA)