

Becoming an Enrolled Agent: Easy Steps toward Enhancing the Growth of Your Business

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At TaxAct, we know that thousands of our TaxAct Professional® customers have successfully developed a business of their own over years of hard work and sacrifice. Others, however, have only recently begun to experience what the tax preparation industry has to offer. One common element across the board, however, is a prevailing need to excel, to rise above the competition and make a mark that stands out.

As you know, the ability to meet your clients' needs is dependent on numerous factors. While some may turn to you for simple return preparation, others have more complex situations that require more of your time and expertise. Regardless of how many returns you prepare each year, you feel the need to offer an exceptional level of service — that's where the status of an Enrolled Agent comes into play.

Benefits of Becoming an Enrolled Agent

The reasons to become an EA are numerous, as are the tangible benefits to your business. The ability to offer unrestricted representation, for example, is a major incentive for many professionals in the tax preparation industry. Federal law only grants EAs, licensed attorneys, and CPAs the right to represent taxpayers before the IRS without limitation. In other words, EAs can represent clients in all matters of examination, collection, and appeals before the IRS.

Another benefit of becoming an Enrolled Agent is the ability to prepare returns outside the scope of the 1040 series. If you have clients who are seeking consultation regarding estates and trusts or tax-exempt organizations, your EA coursework will prepare you to address their needs confidently — allowing you to take on a wider range of clients.

The EA credential also demonstrates to both your competition and potential clients that you've met a higher standard of tax competency. This goes beyond the realm of looking better on paper; your certification puts you in the position to earn up to 40% more due to the broader menu of services you'll be able to offer.

Step-by-Step: It's Simpler than You May Think

To become an Enrolled Agent, you must first obtain your Personal Tax Identification Number, or PTIN. To achieve this, you'll need the following:

- Your individual tax return from the prior year
- Your Social Security number
- Your personal and business information
- Information on any U.S.-based professional certifications
- An explanation of any issues involving tax obligations
- An explanation of any felony convictions

When you have all of the required information, simply create an account on the IRS website and apply for your PTIN.

Second, it's important that you study for your Special Enrollment Examination, or SEE. TaxAct Professional has partnered with Surgent Professional Education to offer you an Enrolled Agent Exam Review course, an invaluable asset to your tax preparation business. This course provides unlimited online access to all course

materials, including up-to-date IRS publications, Complete Text, Simulated Exams, Adaptive Learning Technology, and a Pass/Refund Guarantee.

The Enrolled Agent Exam Review contains over 1,800 multiple choice questions, which is part of the reason that 80% of Surgent users pass the EA exam.

With Surgent's EA Exam Review course, you'll be fully equipped to pass the Special Enrollment Exam. Powerful adaptive learning technology gives you a personalized study program that helps you focus specifically on the areas where you need the most help — potentially cutting your study time in half! And because it's a completely online program, you can study whenever and wherever is most convenient for you.

Next, register for and take the SEE. Upon receiving a passing score on your Enrolled Agent Exam, you'll be eligible to apply for enrollment to practice before the IRS. You'll also need to pass a sustainability check, which includes a background check and a tax compliance check.

Save 20% on Surgent's Full, Three-part EA Review Courses with TaxAct

Review for all three parts of the Special Enrollment Exam with full text answers to relevant test questions, complete IRS publications, web-based review, and more. Increase your bottom line, boost your business's earnings, and gain a competitive edge when [you get your EA certification now](#).

[◀ A Quick, Friendly Reminder: The Individual Extension Deadline is Less than a Month Away](#)

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