**EMPLOYEE PARTICIPATION SURVEY**

Please choose ONE answer by marking “X”:

1. **How would you describe your personal tax preparation routine?**
2. \_\_ I have been going to the same accountant for years.
3. \_\_ I usually go to a local, quick tax place to get my returns filed (i.e., H&R Block, Liberty Tax, etc.).
4. \_\_ I file my own taxes using TurboTax or similar preparation software.
5. **How would you rate the service you currently receive?**
6. \_\_ It is ok, I would consider switching to another service provider.
7. \_\_ It was frustrating; the accountant was too busy to get back to me, or I felt I was getting charged for every single phone call.
8. \_\_ I am happy with my current tax professional.
9. \_\_ I am confident that my tax preparation software can answer all my questions accurately.
10. **What is most important to you with respect to tax service?**
11. \_\_ The credentials of the tax preparer or the knowledge of tax is irrelevant to me. I just want to get my returns filed and receive my refund as quickly as possible.
12. \_\_ I prefer that I work with a licensed CPA not just during tax season, but throughout the year, because I want the best case scenario for my situation.
13. **Would you take advantage of a benefit where experienced CPAs come to the workplace to answer all your tax questions, file your tax returns at competitive prices and reduce tax season stress?**
14. \_\_ Yes, the convenience and expertise would save me valuable time and reduce stress for filing taxes.
15. \_\_ No, I would still go to the local quick tax office to file and/or do my own.
16. \_\_ I would give it a shot, as long as the cost makes sense and if the service is top notch.
17. **If you took advantage of an on-site tax service would you be willing to pay a small premium over the “fast food” offices if it means getting the right answer for your tax situation?**
18. \_\_ Not really, it’s all about getting my taxes done as cheaply and quickly as possible.
19. \_\_ Yes, a licensed tax professional can help me figure out my best case scenario and can find creative ways of saving money on my tax liability, especially if my situation is complex.
20. \_\_ It depends on what value the on-site tax service brings to the table.
21. \_\_ Yes, it would make it less stressful than taking time off from work to get my taxes done.
22. **How important is it to maintain a long term working relationship with your tax professional?**
23. \_\_ Very important. S/he is like a partner who I trust to give me sound tax advice for my particular situation.
24. \_\_ Not very important. My situation is very simple and I can handle my own taxes.
25. \_\_ I want to be able to call my accountant for a quick question without worrying about getting charged for every single call.
26. **Once you establish a good working relationship with your accountant do you need to meet in person every year, or will phone/email/Skype be sufficient?**

Yes, I still need to meet once a year \_\_ No, it is not necessary, I am fine with using phone/email/Skype \_\_

1. **Would you take advantage of the** [**Taxes at Work**](http://www.waterstreettax.com/financial-wellness/) **benefit program if we make it available to you?**

Yes \_\_ No \_\_