

NAEA

› National Association
of Enrolled Agents

2024 **MEMBER SURVEY** **SUMMARY**

25 yrs

The average years
preparing taxes

(CURRENT & FORMER MEMBERS)

ABOUT THE RESPONDENTS

13 yrs

Average years as an
NAEA member

(CURRENT & FORMER MEMBERS)

30%

Earned their EA license within
the first 5 years of starting
their tax preparation careers

(CURRENT MEMBERS)

2,150

Responses

~42%

Hold a Bachelors
Degree

(OVERALL)

80%

Are solo practitioners or owners
or employees of small firms

(CURRENT & FORMER MEMBERS)

ABOUT THE
RESPONDENTS

77.3%

Of their annual returns are
for individual returns

(OVERALL)

45%

Practice IRS
Representation

(CURRENT MEMBERS)

446

The average annual
tax returns prepared

(CURRENT MEMBERS)

95%

Focus on tax
preparation

(CURRENT MEMBERS)

THE RESULTS ARE IN:

96%

Ninety six percent of members surveyed reported they are **likely to renew/retain NAEA membership over the next several years.**

72%

According to seventy-two percent of respondents, **NAEA membership services are important.**

63%

Sixty three of respondents said they were **satisfied with NAEA Membership.**



2024 Member Survey

98%

98 percent of members indicate that staying informed on tax law and regulatory changes as an extremely or **very important business challenge.**

86%

86 percent of respondents said that interaction with the IRS was an **important business challenge.**

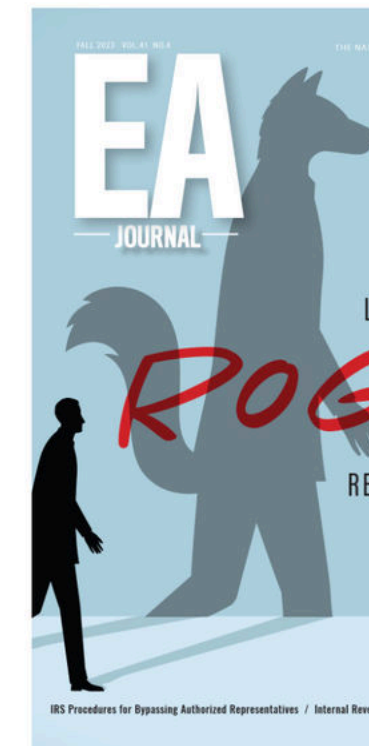




2024 Member Survey

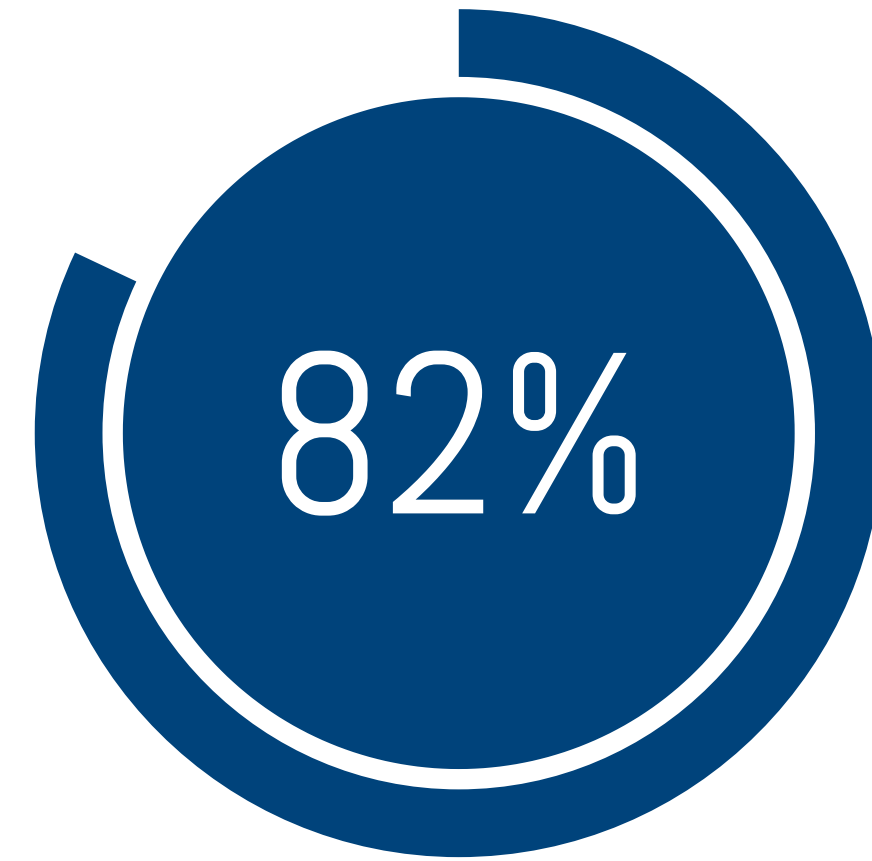
85%

EA Journal has the highest satisfaction rating overall with 54% very satisfied and 31% somewhat satisfied, 85% are satisfied overall.





NAEA 2024 Member Survey



Over three-quarters of the
respondents emphasized
the importance of
advocacy

NAEA 2024 MEMBER SURVEY

75%

A significant portion of respondents found **IRS-specific advocacy activities to be the most important, with 75% rating it as extremely important.**

60%

Members rate **advocacy as one of the top 6** most important services NAEA offers, **with a 60% overall satisfaction rate.**

=

Current and never-members **equally support CE requirements,** while former and never-members **favor competency exams and PTIN revocation for violations.**

Most Important Trend NAEA Should Focus on Long-term

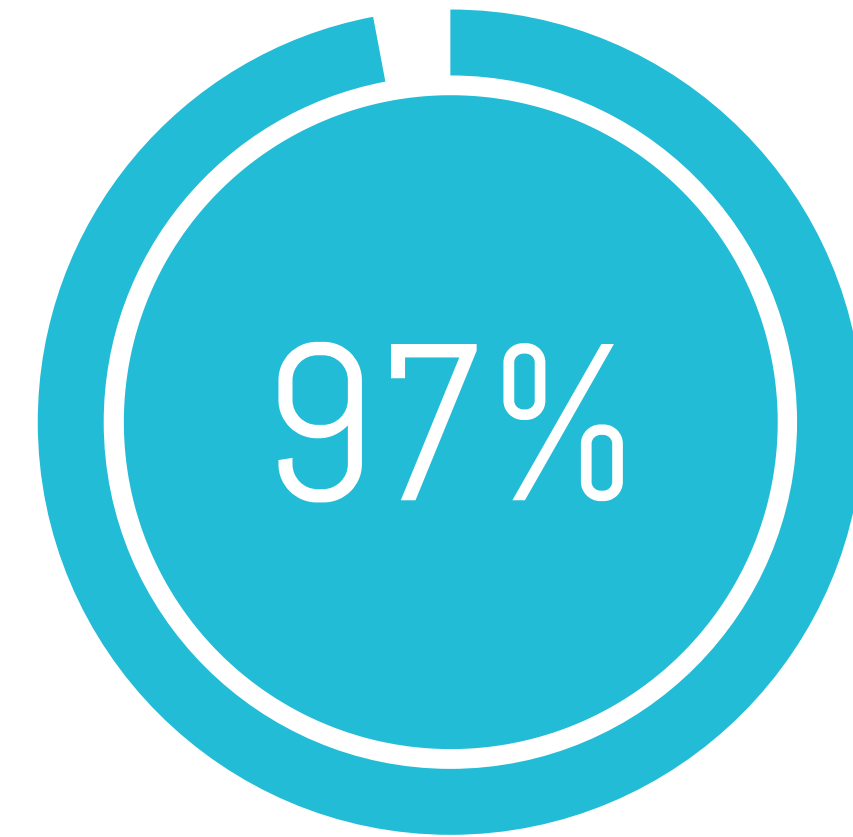


PUBLIC AWARENESS OF THE EA CREDENTIAL

Public awareness of the EA credential is regarded as **the single most important long-term trend** that NAEA should focus on.



NAEA 2024 Member Survey



Nearly ALL respondents
found NAEA's Continuing
Education Programs
important.

NAEA 2024 MEMBER SURVEY

48%

The most common specific source of education credits among current members is **NAEA webinars/online education**.

41.6

Current members earn an **average of 41.6 credits per year**.

82%

Members rate **NAEA's Continuing education as the top** most important service offered, with an 82% satisfaction rate.



2024 Member Survey

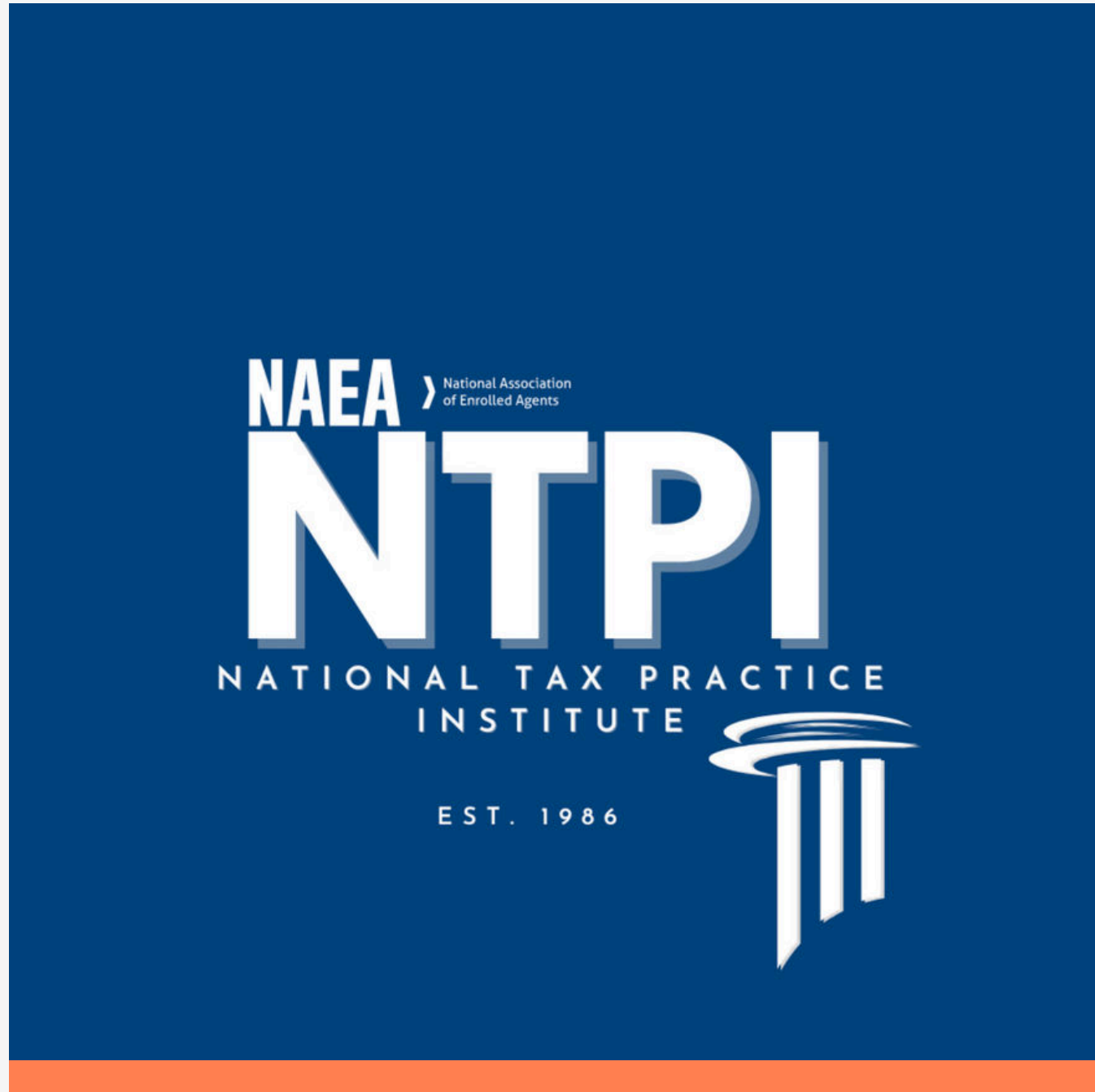
58%

The TaxBook is the most commonly used tax research software among respondents.

50%

Half of our members use **Drake and Intuit Pro** tax software.





NAEA 2024 Member Survey



**Respondents deemed
NAEA's National Tax
Practice Institute® (NTPI)
program an important
service.**

NAEA 2024 MEMBER SURVEY

50%

Half of the respondents were **very satisfied with NTPI.**

20%

One-fifth of current **members are NTPI Fellows.**

2nd

Members rated National Tax Practice Institute (**NTPI**) **the second most important service** following behind Continuing Education Programs.

What do respondents have planned for the next 5 years?



31% of current members plan to expand their practice volume

19% plan to retire, and 17% plan to scale down their practice in the next 5 years.

2024 **MEMBER SURVEY** **SUMMARY**

What Members are Saying...

"Continue the high level of advocacy, I have been an EA since 1974 and the improvement in our status has been amazing."

"I would REALLY like for the NAEA to talk to the Ways and Means Committee about the Federal Withholding and payroll."

Comments from survey respondents on **Advocacy**

NAEA

2024 Member Survey

"You are our voice in Washington DC. Need you to emphasize how complicated taxes have become and get the IRS funded to be able to help taxpayers."

"I am new to NAEA, but have heard GREAT things about the organization as a value add to my continued education and success as a tax professional seeking to get into tax resolution and representation work."

"Continue to provide quality education for this industry."

Comments from survey respondents on **Education**

NAEA

2024 Member Survey

"I like recent offerings by NAEA of special short-courses in areas of individual taxation."

"NAEA has been expanding its webinars and opportunities for agents to interact. Very beneficial."

“Keep connecting with members in ways that resonate with a variety of member needs. Demonstrate and foster unity.”

“Let's push for more statewide and local networking opportunities.”

Comments from survey respondents on
NAEA Services & Engagement

NAEA

2024 Member Survey

“When I call, the staff have been very helpful. I will continue to support them.”

The logo for the National Association of Enrolled Agents (NAEA) features the letters 'NAEA' in a bold, sans-serif font. The 'N' and 'A' are light blue, while the 'E' and 'A' are dark blue.

› National Association
of Enrolled Agents

2024 MEMBER SURVEY SUMMARY

<https://www.naea.org/membersurvey/>