

## Top 10 Questions All Small Business Owners Should Ask When Hiring an Accounting and Tax Firm

Asking the right questions is very important to any small business owner. If your goals are to build and grow your business, your accounting and tax team will be your most valuable asset.

1) How are you different than all other firms?

The firm you hire should be passionate about their processes and methods of how they will save you time and money. Read reviews and gauge the enthusiasm of their clients.

2) How do you ensure my tax liability will be minimized?

Tax planning is a process requiring intimate knowledge of your bookkeeping and financial statements. Your firm must be involved in your bookkeeping as well as meaningful tax planning.

3) How quickly do you respond to clients?

A major source of client frustration is the lack of responsiveness. A respected firm should be able to tell you how long it takes to return inquiries.

4) How often should we be meeting?

As often as necessary to ensure your tax exposure is minimized and the necessary accounting completed.

5) How large or small are you?

The firm you choose must be able to address all of your concerns. Regardless of whether a large or small firm, your concerns must address to your satisfaction.

6) Describe what you do for small business clients.

A clear process and schedule must be articulated. You shouldn't be the one asking the questions here.

7) How do you charge?

Hourly, fixed fee, or a combination? Will you know how much you will pay per year or will it be constantly surprise (and frustrated) when I visit the mailbox?

8) Tell me about your staff.

Is the response enthusiastic with details of staff numbers, qualifications? How you, as a client be interface?

9) Can you tell me how my industry is unique?

This question will provide insight to the knowledge and experience the firm possesses in handling your unique circumstances.

10) Can you handle my other accounting and tax requirements?

You may have other requirements such as new company incorporation and setup, payroll, investment planning and savings plan options, help to understand financial statements.

If you are currently interviewing firms, please call us to set an appointment to learn how we are unique with our holistic approach in managing the bookkeeping, accounting, and tax planning and preparation for our 400+ small business clients nationwide.



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