

The Top 5 Areas That a Small Business Owner or Entrepreneur Should Ask Questions and Make Inquiries About When Hiring a CPA Firm.



Finding the answers to these questions is very important to any small business owner for 2 reasons.

First is because the CPA firm you choose is going to have an **intimate knowledge of your financial situation**, do the accounting or bookkeeping for your company, prepare your taxes and financial statements and in essence is going to know more about you potentially than your best friend and maybe even your spouse - so it's important to ask questions and choose the **RIGHT firm** and one that **works well with you**.

The second reason is as a Small Business Owner or Entrepreneur, your business goal is to usually build or grow your company. And so asking the right questions in these Top 5 areas can help you identify a good CPA firm AND one that **will help you grow and be a business resource for you**, not only during tax season but every quarter as you're operating and building your company.

1. What's the Background of Your CPA Firm?

- Succinctly describe your CPA firm and what you try to offer.
- What is the difference between your CPA firm and others?
- Do you have public reviews on the internet that I can read?
- Do you have a specialty or specialties?
- How big or small are you?
- Describe your typical client and what you do for them.
- How do you charge and when do I pay you?

2. Tell Me About Your Personnel.

- Who works for your company and who will I work with at your company?
- Where can I see the backgrounds and certifications of your staff?
- Has your CPA firm been peer reviewed?
- Do you outsource to other vendors to get the work completed?
- Do you have full time or part time people?
- What timeframe for response should I plan on in working with you and your staff?

3. What is Your Industry Experience?

- Do you have other clients in my industry?

- What is important in my industry for accounting, tax and management issues?
- What can you tell me that I can do different in my accounting and taxes that apply to my particular industry?

4. What Accounting Systems Do You Support?

- I use a particular type of software. Are you familiar with this software?
- Do you have professional staff that is certified as experts in using this software?
- Do you think I should consider any other software from what I have talked to you about?

5. What Other Services Do You Offer?

- What other services do you offer besides accounting and tax preparation? Examples would be:
 - Personal financial planning
 - Audited financial statements
 - IRS audits
 - Management advice and recommendations
 - Estate planning
 - Accounting systems work
 - New company set up.

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If you are looking to hire your first accounting firm OR maybe change firms, we want you to **INTERVIEW & ASK US QUESTIONS FIRST** to see if **WE fit YOUR needs**. That's why we offer you a **Free 30-Minute No-Obligation Accounting / CPA Service Consultation**.

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