

Choosing the right accountant

Question Guide

Looking for an accountant but don't know where to start?

Use our checklist to weed out the rest and find the best accountant for you!

1. Do you want your accountant to

- a) just do your tax
- b) Help you understand your numbers

2. Which services should your accountant complete?

- Data Entry
- Bookkeeping
- BAS/ Tax prep
- Full virtual CFO- ie Full service *HELP*

3. Do you want your accountant to be a trusted member of your team?

- Yes
- No

4. What is important to you?

Think customer service, response times, values, experience

5. Are they upfront about fees?

- Yes
- No

6. Do they charge for quick emails and phone calls?

Look for fine print about 15 min minimum charge and all hours billed

- Yes
- No

7. What are your values and what is important to you? Is it also important to your accountant?

Think about whether it might be: making money for your family, building an empire, your accountant seeing you or understanding your family and commitments

Finding the person that's right for you, could be the difference between success and failure



Accounting with a Difference.