



9 Questions You Need to Ask Before Hiring an Accountant or Bookkeeper



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BOOKKEEPING & ACCOUNTING

9 Questions You Need to Ask Before Hiring an Accountant or Bookkeeper

Being a small business owner is difficult. You wear all the hats – supply, payroll, marketing, and whatever else needs to be done. And if something goes wrong, it's your problem. With all that pressure, why add more stress by managing your own bookkeeping?

Think you're ready to hire an accountant or bookkeeper? How do you hire the 'right' person for the job? Who can you trust to keep your accounts? If you don't understand what they do, how can you know what to ask? It's enough to make your head spin!

Here are nine easy questions you should ask to make sure your potential accountant or bookkeeper is the right fit for you and your business.

1

Who owns my data?

Unfortunately, this is a question that many small business owners don't even think of asking. It's one of those "I assume" questions. And it would seem pretty obvious: after all it is your business so it's your data. BUT just like the fine print on electronic contracts (think updating your iPhone or any other app) there can be hidden issues. Ask your accountant/bookkeeper if they use online accounting software. And if yes, who's name will the account be under; the accountant or the business? Whose name is on the account generally is the one who "owns" the information.

2

Who will I directly work with?

Many firms have a myriad of account managers or representatives so sometimes it's easy to get lost in the crowd. Ask about turnover rates and get a name and contact information for your specific point of contact.

3

How do they communicate with clients?

Are they local? Some people like to talk on the phone. Others would rather get an email or even a text. Others want face-to-face meetings. What's your preferred mode of communication? And will your accountant honor that?

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What is their level of expertise?

What credentials do they have? Do you know what “CPA” really means? A Certified Public Accountant or CPA has at least a bachelor’s degree, passed a rigorous state administered test, had two years of public accounting and must have a minimum of 80 hours of CPE every two years. Many state licensing boards require CPA’s to take Continuing Professional Education courses each year. Experience counts for a lot but with ever changing tax codes and business regulations, it’s necessary to make sure you’ve got someone at your side who is plugged in and on top of any breaking changes.

5

How familiar are they with your industry?

Not everyone can be a specialist but it’s helpful if they’ve had some experience in your specific industry. The rules for a restaurant are different than the rules for a coaching service.

6

Can they customize their service?

Your business is unique, how will your accountant/bookkeeper accommodate any specialty needs you may have? And how much more will it cost you? Know this up-front so you’re not surprised.

7

Is there anything they can’t provide?

If you’re looking for a particular service like tax filing or handling your payroll then ask specifically about those services of course. But take it a step further and just ask – what don’t you provide? You may be surprised at the answer.

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8

What makes them different from other accountants/bookkeepers?

Not all accountants or bookkeepers are created equal. Be it education or experience or even just their demeanor. And they should be able to tell you at least one reason (two or three is better) as to why they would be a good fit for you and your business.

9

What will my responsibilities be?

What does your accountant or bookkeeper expect from you? In other words, what do they need you to do so they can do their job. They can't exist in a vacuum. And you don't want them to. You will need to provide bills, hours of work, receipts, etc. A whole host of 'stuff' actually. You and your accountant/bookkeeper are a team now and it requires the ability to work together to accomplish your financial goals.

Hiring someone to help with your finances can be a big step. But it doesn't have to be scary or complicated. Ask your potential bookkeeper/accountant these nine questions and make sure you hire the right person for the job. Don't leave it to chance, your business success depends on it.

We'd be honored to meet with you and answer any questions you have – about our services or how you can find the best bookkeeper or accountant for YOUR business. Please give us a call today.

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