



## 15 Questions to Ask Your Prospective Accounting Firm

- 1) **Do they have an understanding of your industry?** Although helpful, this is not essential. Don't automatically dismiss a great firm with other benefits just because they have not worked in your particular industry. An excellent firm can get up to speed pretty quickly.
- 2) **Do they employ specialists?** The company may need to employ specialist in areas like payroll, sales tax, business development, etc.
- 3) **Will I get a team manager assigned to my company?** Really valuable! You need to know there will be a specific team manager assigned to your company. You also want to make sure the firm has sufficient staff to cover absences.
- 4) **How much training does your team undertake in order to keep current with the latest thinking in taxation and accounting?** What you know today bears no reflection on what you need to know tomorrow. You need to work with a firm that is staying current.
- 5) **Can I speak to other clients that the firm represents?** Any company can portray themselves as being fantastic, speaking to their clients is perhaps the best way of measuring their performance and standing in the industry.
- 6) **What is their philosophy on how to build a business?** It's an important question and the response should tie in with your philosophies.
- 7) **What are their customer service commitments?** Are they committed to customer services and are their core values and commitments documented in the form of the Business Mission Statement?
- 8) **What systems do they employ that will provide continuity of service (i.e. in the event of the main point of contact being incapacitated)?** What happens if for some reason they cannot maintain their level of service to you? Is there a backup?
- 9) **Will they maintain monthly or quarterly financial statements, based upon your company's needs?** You need to be able to monitor the company's finances on a consistent basis.
- 10) **Are they insured and if so how much coverage is provided?** It should be at least a \$500,000 professional indemnity policy.
- 11) **How will they communicate with you?** Do they have a written policy regarding communication?
- 12) **Do they have testimonials from other satisfied customers?** Once again getting someone else's comment is very useful.
- 13) **Will they take time to learn about your business?** Preferably by spending time with you and also through questionnaires.

- 14) How much input do they expect from you?** The best relationships come from a joint effort.
- 15) What do they believe makes them unique?** Watch for vague clichés like, quality, value, commitment and service. You want something meaningful like a promise or a guarantee.

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**Legacy Tax & Resolution Services, LLC**  
**800-829-7483 800-Tax-Site**

**Stephan H. Brewer, CPA, CTRS, JSM Tax**  
**[www.LegacyTaxResolutionServices.com](http://www.LegacyTaxResolutionServices.com)**

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National Toll Free 800-829-7483

National Fax Fax 480-248-1588

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Local Phone 201-450-9700