

20 Questions to Ask a Bookkeeper or Accountant

About Their Business

- What services do you offer to your clients? (Accounts payable, accounts receivable, payroll – look for all of the above.)
- Why shouldn't I do this stuff myself? (A good answer: Stick to your specialty, your expertise, and the company and work you should be focusing on.)
- What kinds of clients do you have? (They don't have to know your industry but it's good if they work with similarly sized businesses of one.)
- What's the best way for me to get my data to you? (It should be compatible with what you like.)
- What steps do you take to secure my data in your possession? (Example: locked filing cabinets, safes, locked offices, security alarm system)
- Will you handle all of my payroll, payroll taxes, and my quarterly payments? This is all tax preparation leading into the next year so make sure they handle this.
- Do you work by yourself or do you have staff? (You want to know who will be handling your finances.)
- What hours are best for you?
- Who will be my main contact (if not person you're meeting with)? (You probably want to meet them.)
- Do you do year-end taxes? (If you are incorporating, ask, Do you do corporate returns?)
- Do you have a CPA referral or if I have a CPA, are you comfortable working with him/her?

About Costs To You

- What software do you use? Do I need to purchase the software myself?
- How do you charge? Do you bill hourly or do you charge a flat monthly fee? (For hourly, you can establish a cap where you are notified when your bookkeeper exceeds a set amount of hours per month).
- If hourly, how many hours do you think it will take to do my bookkeeping?*
- What other kinds of charges can I expect? (Example: Payroll fees)

More About Them

- How do you like to work? (Online, phone, in person)
- What financial tasks do you NOT do?
- What kind of relevant certifications, licenses or degrees do you have? (Look for