

HIRING AN ACCOUNTANT

Interview Questions

This free resource from WISE WBC helps entrepreneurs find the right accountant. Use the worksheet below to prepare for and conduct an interview with a potential accountant.

COME PREPARED WITH

- General description of your business including any changes in current year/near future.
- An idea of the services you're looking for, like:
 - Tax Services
 - General Accounting Services (bookkeeping, AR, AP, etc.)
 - Human Resources
 - Consulting (tax, finance, project based etc.)
- Current recordkeeping methods
- Prior year tax returns

QUESTIONS TO ASK

What's included in the scope of services provided?

Helpful in understanding exactly what you are getting out of the service provided and what would be considered additional/consulting work.

What's the price of the services provided? How will I be billed?

Services provided may be billed on a monthly, quarterly, or annual basis. If project related or an annual service, you may get a bill once the service is complete for the entire service.

QUESTIONS TO ASK (cont'd)

What should I expect in terms of timing of services provided?

This is usually dependent on type of service requested. Taxes may be done annually, or some businesses require quarterly/monthly work. General accounting services may be provided monthly.

Who will I be interacting with?

Helpful in determining if you will have a dedicated representative or if you will be bounced around. Also helpful in understanding qualifications of individuals you will be working with.

How often will we be in touch? How will we communicate?

Helpful in setting expectations of when communication will occur, method of communication and what is expected from each party.

Do you have experience working in my industry?

If no, what measures are taken to ensure the accuracy of services provided?

Will my information be secure?

What records should I keep and provide?

Organization documents, copies of prior year tax return, records of revenues & expenses, purchase and sale of assets are helpful.

What services are available down the road as my business grows?

If you are intending to grow business, this question may assist in understanding what other outsourced services could be integrated down the line.

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