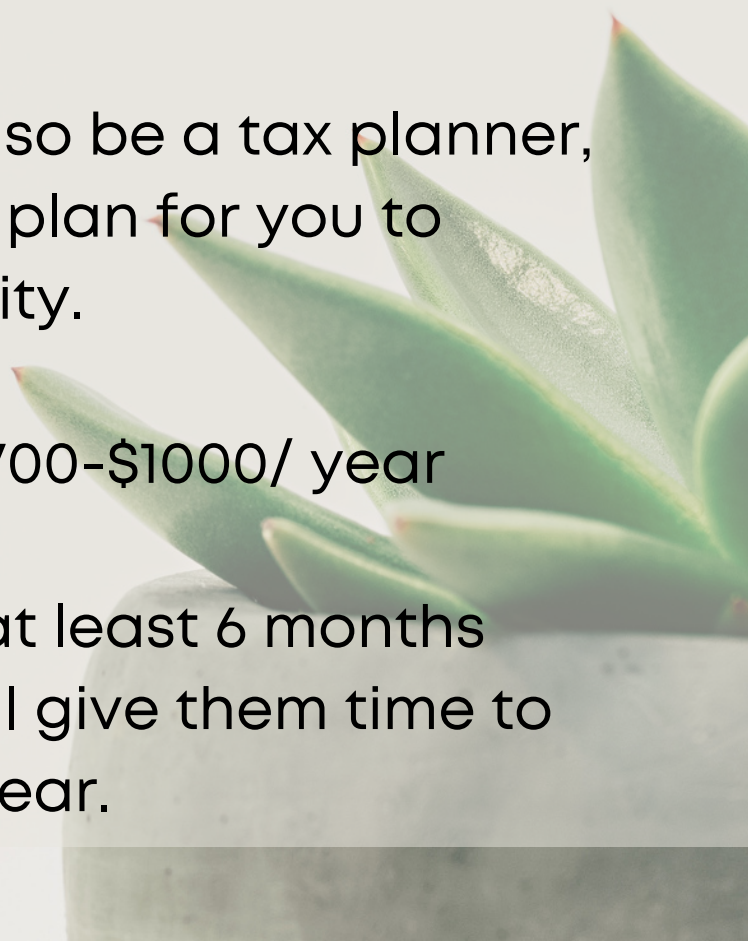


A top-down view of a desk with a laptop, a smartphone, a coffee cup, a notebook, and a pen. The text is centered on a white rectangular background.

TEAM MEMBER  
NUMBER 1  
INTERVIEWING AN  
ACCOUNTANT

# ACCOUNTANT TID-BITS

- Tax preparers are backwards-looking: they save you taxes on the prior year and look at your business from a legality perspective.
  - A tax preparer can also be a tax planner, and can strategize a plan for you to reduce your tax liability.
  - Tax preparers cost \$700-\$1000/ year
  - Find an accountant at least 6 months prior to filing. This will give them time to look over your prior year.
- 

# HOW TO FIND AN ACCOUNTANT

The best way to find an accountant is through referrals from trusted friends, family, or business colleagues. Ask people you know who have similar needs to yours (example: people in the same industry as you). You can also check with your State Board of Accountancy or State CPA Society.

<https://us.aicpa.org/research/externallinks/associationsstatecpalinks>

# INTERVIEW QUESTIONS

Have you worked with a small business before?

What is your fee and what does it include?

Are you available for questions from me/ my  
bookkeeper throughout the year? Do you bill  
extra for this?

Do you help plan for retirement?

Do you do tax advising? Or tax prep?

Can you help me make a decision to lessen my  
tax burden in the future?

Decide on the accountant who is best for your business!

Name

Number

Email

Notes

Name

Number

Email

Notes

Name

Number

Email

Notes

# FINAL STEP

Once you've chosen your accountant, schedule your initial meeting. Gather last years tax paperwork to have on hand.

Also note any relevant life changes, such as marital status, home ownership, or dependents.

