



Twenty Questions for Your New Tax Advisor

All CPAs have the same basic skills. After all, they all must pass the same test in order to call themselves a CPA. Still, not all CPAs are identical. There are good fits for your business and bad. Ask potential CPAs the following questions in order to choose one who is right for you.

1. What are your credentials? Are you a CPA?

2. What are your fees, and how do you charge?

3. How many years of experience do you have?

4. Do you work with other small business clients?

5. Do you have other clients in my industry?

6. What services do you offer?

7. How long does it take you to return a phone call or e-mail?

8. How much time do you need in order to complete a tax return?

9. What can I do to make your job easier and to keep my costs down?

10. What's your firm's philosophy about serving clients during tax season? Are you typically available?

11. What is your turnover in your client base?

12. Of your current clients, how many have you had for at least five years?

13. How big is your firm, and how many people will be working on my account?

14. Can you provide me with two or three references?

15. How will you help me grow my business?

16. If my business grows, will yours be able to grow with me?

17. What do your clients do when you're on vacation?

18. Do you have existing relationships with banks and/or lawyers that I can take advantage of?

19. If I'm ever audited, will you represent me with the IRS?

20. How do you prefer to work? Are you a paper kind of firm, or do you do everything electronically?
