



Business Owner Accountant Checklist

Choosing an accountant is one of the most important decisions you'll make for your business. Treat this decision with the gravity it deserves.

- ☐ Get a referral from a trusted source: another business owner who is successful and whom you admire.
- ☐ Make sure your accountant is professionally affiliated eg. that they're a member of one of the accounting bodies, which means they've got relevant qualifications, keep up to date with the latest legislation and have signed up to a code of ethics.
- ☐ Technology has rapidly transformed accounting. Make sure your accountant is comfortable with and open to these changes.
- ☐ Have an open conversation at the beginning to clarify roles and responsibilities.
- ☐ Ask what services your accountant can provide and decide together which ones you'll need for example we advocate having a separate bookkeeper as per our checklist [here](#).
- ☐ Make sure you feel comfortable speaking with your accountant, that you understand the answers they give to your questions
- ☐ Respond promptly to requests for information. They'll usually be based around compliance and helping you to avoid penalties and fines.
- ☐ Find out what your accountant expects from you and when.
- ☐ Ask about fees and what's included.
- ☐ Ask what items aren't included in that fee and what additional services your accountant can provide.
- ☐ Shop around, have a few conversations. Don't sign up with the first accountant you speak to. Your accountant can often be with you for the life of your business. And we all know long-term relationships are not to be entered into lightly.