



Choosing Your Accountant Checklist

1 About their firm

	Yes	No
1.1 Do you like them?	<input type="radio"/>	<input type="radio"/>
1.2 Do they speak your language i.e. plain English?	<input type="radio"/>	<input type="radio"/>
1.3 Do you feel that they are approachable and you can ask them questions?	<input type="radio"/>	<input type="radio"/>
1.4 Do they have experience in your industry?	<input type="radio"/>	<input type="radio"/>
1.5 Do they have a professional brochure?	<input type="radio"/>	<input type="radio"/>
1.6 Do they a good reputation?	<input type="radio"/>	<input type="radio"/>
1.7 Do they have testimonials and case studies?	<input type="radio"/>	<input type="radio"/>
1.8 Are they professionally qualified and regulated?	<input type="radio"/>	<input type="radio"/>
1.9 Do they have a set of values that everyone works to in the practice?	<input type="radio"/>	<input type="radio"/>
1.10 Is their office tidy and professional?	<input type="radio"/>	<input type="radio"/>
1.11 Do they offer business advice?	<input type="radio"/>	<input type="radio"/>
1.12 Do they hold seminars and events which may help your business?	<input type="radio"/>	<input type="radio"/>
1.13 Have they any accolades or awards?	<input type="radio"/>	<input type="radio"/>
1.14 Do they have professional indemnity insurance in place?	<input type="radio"/>	<input type="radio"/>
1.15 Do they have a continuity arrangement with another accountant?	<input type="radio"/>	<input type="radio"/>
1.16 Do they regularly undertake staff development and CPD?	<input type="radio"/>	<input type="radio"/>
1.17 Do they have a network of advisors to support you in all areas of your business?	<input type="radio"/>	<input type="radio"/>
1.18 In the event of a crisis such as Covid-19, can they work remotely?	<input type="radio"/>	<input type="radio"/>

2 About their pricing

	Yes	No
2.2 Do they offer fixed fees?	<input type="radio"/>	<input type="radio"/>
2.3 Is their proposal professionally prepared?	<input type="radio"/>	<input type="radio"/>
2.4 Will they review your fee regularly to make sure you're being charged fairly?	<input type="radio"/>	<input type="radio"/>
2.5 Will they tell you in advance of any extra charges?	<input type="radio"/>	<input type="radio"/>
2.6 Do they offer any form of money back guarantee?	<input type="radio"/>	<input type="radio"/>

3 About their services

	Yes	No
3.1 Do they agree a timescale for completing your work?	<input type="radio"/>	<input type="radio"/>
3.2 Do they have a guaranteed response time for calls and emails?	<input type="radio"/>	<input type="radio"/>
3.3 Do they charge for meetings?	<input type="radio"/>	<input type="radio"/>
3.4 Do they charge for phone calls?	<input type="radio"/>	<input type="radio"/>
3.5 Do they charge for advice by email?	<input type="radio"/>	<input type="radio"/>
3.6 Do they charge for their services based on time?	<input type="radio"/>	<input type="radio"/>

4 About their communications

	Yes	No
4.1 Will they provide you with a key point of contact in the firm?	<input type="radio"/>	<input type="radio"/>
4.2 Is there a plan in place for when your point of contact is absent?	<input type="radio"/>	<input type="radio"/>
4.3 Is there a process for urgent or out of hours communication?	<input type="radio"/>	<input type="radio"/>
4.4 Can you speak to existing customers to validate the services offered?	<input type="radio"/>	<input type="radio"/>
4.5 Does their website look professional?	<input type="radio"/>	<input type="radio"/>
4.6 Do they have a social media presence?	<input type="radio"/>	<input type="radio"/>
4.7 Are they easy to contact and communicate with?	<input type="radio"/>	<input type="radio"/>
4.8 Will they provide you with legislative updates when appropriate?	<input type="radio"/>	<input type="radio"/>
4.9 Do they prepare a regular newsletter?	<input type="radio"/>	<input type="radio"/>
4.10 Do they have a Facebook community/networking group?	<input type="radio"/>	<input type="radio"/>
4.11 Do they clearly communicate what is expected of you as a client in terms of providing information to them?	<input type="radio"/>	<input type="radio"/>

5 About their processes and systems

	Yes	No
5.1 Is their IT backed up and secured safely?	<input type="radio"/>	<input type="radio"/>
5.2 Do they have a disaster recovery plan in place?	<input type="radio"/>	<input type="radio"/>
5.3 Do they regularly invest in technology to improve efficiency for both you and them?	<input type="radio"/>	<input type="radio"/>
5.4 Do you have to use a certain software product and if so why?	<input type="radio"/>	<input type="radio"/>
5.5 Can they recommend any apps to help save you time?	<input type="radio"/>	<input type="radio"/>

