



Questions for Interviewing a CPA

1. Credentials
 - a. Do you maintain an active CPA certificate?
 - b. How long has your firm been in business?
 - c. Do you carry malpractice insurance?

2. Staff/Team Members/ Size of Accounting Firm
 - a. Will I have a primary contact?
 - b. Who will be doing the work?
 - c. Do you outsource any area of your business?

3. Area of Expertise
 - a. Do you have experience with the type of business we will be operating?
 - b. What areas of Tax and Business Advice do you specialize in?

4. Tax Preparation
 - a. How often will we communicate about tax issues?
 - b. How do I handle start-up costs (new business)?
 - c. How do I handle capital expenses?
 - d. Should I be an S Corporation?



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5. Accounting Software Expertise

6. Division of Work
 - a. How will you divide the data entry/financial work?
 - b. How can we keep fees to a minimum?

7. How do you bill for your services?

8. Can you help with planning for business growth?

9. Are we a right fit for each other?

10. What services do you not provide?



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