

Questions in Screening your accountant:

How often will you review my books with me? (typically, for a growing business, you want this to be at least quarterly).

Can we do quarterly meetings so that I can understand my tax liabilities throughout the year and make the best decisions for my business?

What is the turn around time for emails/ phone calls and what do you charge for questions (if it's a good accountant they typically charge you a fee yearly (you can request to pay it quarterly) but they don't charge you for questions).

What is the best method of communication for you?

What industries are you mostly associated to (sometimes them having a specialty is good sometimes it is but if you don't mess with their personality, you'll know to run for the hills regardless)

Cash vs Accrual. Currently my books are on a cash basis, but I occasionally run package deals that would throw off my numbers for management purposes. What is the best way to do this in QuickBooks? Should my books reflect cash (money I actually earned that month/ year, or should they be what I physically received in the bank? (we currently do the Cash basis in excel currently from my CRM).