

## Choosing an Accountant

### Objective

Pick an accountant who will scrutinize your operations; give you financial, managerial, and accounting advice; and generally serve as a positive force in your business.

### Preliminary Work

- Decide what services you are seeking and how they might best be performed.
  - Bookkeeping
  - Financial Statements
  - Opinion audits
  - Preparing taxes
  - Management advice
  
- Two websites can help you **find** and **evaluate** an accountant:
  - [www.mylicense.state.pa.us](http://www.mylicense.state.pa.us).  
You can search the database of licensed certified public accountants through the Bureau of Professional Licensure at the PA Department of State.
  - [www.picpa.org/](http://www.picpa.org/)  
The Pennsylvania Institute of Public Accountants' website provides information to the public about the profession and **maintains a database of members searchable by name, county location, type of business, specialty, industry served, or services offered.**

## Criteria to Evaluate

- Reputation**
  - Talk with bankers, lawyers, and other businesses in your community. Local banks will have a favorite accounting firm based on the firm's toughness, stability, financial, and responsiveness.
  - Check the standing of the firm within the accounting profession. Check for American Institute of Certified Public Accountants Committee memberships.
  - Call Better Business Bureau for any unsatisfactory reports. You can also check the County prothonotary's office to see if any disciplinary actions have been taken against them.
  
- Quality Of The Practice**
  - Check for membership in either section of the American Institute of Certified Public Accountants. Quality control and continuing education requirements of the AICPA should indicate a quality practice.

**Professional Development**

- Check if further education is encouraged at the firm. Ask how many courses your accountant has taken or how many seminars your accountant has attended in the past two years over and above what is required by the state.

**Personal Attention**

- Commitment...Ask if a partner in the firm will be directly involved with your account.
- Compatibility...Are you comfortable with the staff accountant who will be doing the work?
- Responsiveness...What does it take to get your account out of the office and to your business?

**Experience**

- How long has the accountant been in business?
- What does the accountant know about your industry and specifically about small business in your industry? Ask for a current client list.

**Overall Impression**

- Evaluate your accountant much as you would a doctor. How does the accountant act and handle himself or herself? Do you like the accountant who will be assigned to your business?

**Fees**

- Ask for the hourly rates of the partner and the staff accountant assigned to your business.
- Ask for an average billing for a company the size of yours and requiring comparable services.
- Shop around. Many times an accounting firm will cut its rates to lure a new client.

**End Result**

- Your accountant will be someone you can trust, someone who understands how your business operates, and someone who is willing to listen and respond with ideas.



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