

# 30 MINUTE Accountant Evaluation

What's Their Score?



## 30 MINUTE ACCOUNTANT EVALUATION - WHAT'S THEIR SCORE?

In simple terms, accountants and auditors prepare and examine financial records. They ensure that financial records are accurate and that taxes are paid properly and on time. Accountants and auditors assess financial operations and work to help ensure that organizations run efficiently.

### 11 questions to ask when evaluating your current or potential accountant:

1. Can you confirm your accountant keeps up with the laws and regulations as you focus on operations, marketing and customer service?  
Yes – No – Unsure
2. Are you timely, accurate and complying with the city, county and state laws and regulations? Is your accountant someone with knowledge about your locality?  
Yes – No – Unsure
3. Are you confident that your bookkeeping system and bookkeeper does not waste time and is optimized?  
Yes – No – Unsure
4. Does your accountant bring more peace of mind? Are you confident that your business is ready to apply for a loan, prepare for an audit, prepare taxes, sell or buy a business.  
Yes – No – Unsure
5. Does your accountant have years of experience and provide insights? Do they have knowledge of the industry?  
Yes – No – Unsure



6. Does your current accountant understand how to provide solutions?  
Yes – No – Unsure
7. Does your current accountant have excellent communication skills?  
Yes – No – Unsure
8. Is your accountant 'the right person' with the appropriate knowledge for their role in your business?  
Yes – No – Unsure
9. Do you know your accountant's specialized background matches up to the needs of your business?  
Yes – No – Unsure
10. Does your current accountant travel to your place of business for your convenience?  
Yes – No – Unsure
11. During peak times of the year, does your current accountant achieve the same level of timeliness, accuracy, communication, and support? (Regardless of where they are on your staff as an employee or an outsourced contractor.)  
Yes – No – Unsure

In regard to the 11 highlighted yes/no questions, the expected answer for each is: "Yes". In the coming months, use this as a reference guide to evaluate your accountant.

If you have already evaluated your current bookkeeper(s) and/or accountant(s) and believe it is time to consider a change, we would be happy to have a conversation with you to talk about your needs.

It is possible that you may need specialized support to supplement your current team. Since our accounting team travels to your place of business, they can support your current team as your business grows. [Contact Eric Moore here.](#)



## ASP

Your resource for Washington and Oregon accounting and bookkeeping services.

Contact us today for a free, no-obligation consultation:

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EVALUATION