

Questions to Ask

WHEN HIRING A CPA

Do you have other clients in my industry?

Can you handle my payroll, W-2s, 1099s, bookkeeping, taxes, advisory, etc.? Is a bundle of services discounted?

Who will I work with? With an assistant or the CPA directly?

What's the process for providing tax documents? Can I email them, upload them to a portal, or provide a hard copy?

What's the turnaround time for tax returns?

Can I ask (call/email/visit) for advice throughout the year?
Will this be billable?

How many historical years of tax returns are needed? Soft or
hard copy?

What's the initial set-up/turn-over process like for financial
information?

Will you sign my tax return and represent me if the IRS comes
knocking?

When do you want my tax information by?

What's the turnaround time for questions or requests?

Will you provide tax advice for new or existing laws that can reduce my tax burden?

How will I be charged? By an hourly or a standard rate?

What are the biggest issues or missed deductions you typically see for my type of business?

What else do I need to know that I've not asked?

Other questions or notes:
