

[New? Start Here](#)[Freelancing and Consulting](#)[Planscope Updates](#)[Bootstrapping and Products](#)

How To Hire An Accountant

JUNE 12, 2013

This is a guest post by Allan Branch of [LessAccounting.com](#)

My story is common among freelancers. I'm a designer by trade. I went freelance in 2005 and started building static websites for customers. The easy part was the actual service I provided. The hard part was the admin side of things: billing, taxes, and contracts. I literally knew nothing about these, so I pushed those tasks to the side and ignored them.

Around tax season, I realized I needed to get an accountant to wave their magic wand over my bank statements. I hoped that somehow I wouldn't owe any money. I looked up a local accountant, called him and the next day had a meeting.

I didn't know what to ask, and I didn't know if he was qualified or even of sound mind. I just blindly trusted him. Shoved my printed bank statements and printed pdf invoices across his desk and stared blankly at him.

Don't do what I did.

Here's how to interview potential accountants. I wish I had this advice all those years ago. In a later article, I'll talk about why you should have an accountant.

Jody Padar, [NewVisionCPAGroup.com](#) says...

Be sure to discuss "beliefs being risk tolerance" with your accountant. Do you want your accountant to be aggressive or conservative in your tax preparation? Also, a lot of accountants offer business coaching, almost mini-cfo roles for you. Talk to your accountant about these services.

Barrett E. Young, III, CPA of [thegreenabacus.com](#) says...

Do they make eye contact? Do they run their own business? Do they spend all their time talking about their certifications? How exposed are they to new/cutting edge tools? Do they read/listen to the same blogs, books, podcasts that you value?

A good CPA knows about business, not just accounting. And don't buy the line that accounting is the language of business. That's just something we tell ourselves to make us feel better about our own inadequacies. Accounting is the language of business past. A true CPA/accountant should be staying current and watching future development enough to help you translate past performance into present actions.

Kevin McCoy of [kevinmccoycpa.com](#) says...

First check the accountant's technical capabilities either via state board of accountancy or equivalent certification source.

1. Ask them how they bill? Hourly? Fixed rate?



about
Brennan Dunn

Hey — thanks for reading! My name is Brennan Dunn, and I'm a freelancer, consultancy owner, author, teacher, and the founder of Planscope. My goal is to help you better succeed as a freelance consultant.

Find out more [about me](#) and the [products](#) I'm working on.

[Follow @brennandunn](#)

2,977 followers

[Follow @planscope](#)

425 followers

Need more than 140 characters? [Email me!](#)

Brennan's Picks

I've hand picked a few of my favorite that are laser focused on helping you grow your freelancing business...

GETTING BETTER CLIENTS

[How To Network](#)[6 Ways To Engage Your Leads](#)[How To Close Deals On Autopilot](#)[Setting The Right Expectations Early On](#)

MAKING MORE MONEY

[Make More Money Through Positioning Your Services](#)[Getting Over The Fear Of Charging More](#)[Offer Packages To Your Clients](#)[Build Up Recurring Revenue](#)

LIVING A BETTER LIFE

2. How do they communicate? Skype? Phone? Email? How often?
3. What are the expectations when a project is in progress – do they want regular updates or just a heads up when it's done? (Communication is the top reason customers fire their accountants.)

Mike Carney of mwcaccounting.com says...

For choosing an accountant, I think you want someone that is both knowledgeable and compatible with your work style. Below are a few questions that I like to hear (since it's just as much an interview for me as it is for them.)

- What industries do you focus on in your practice?
- Any industry specific question to check their knowledge
- What is your availability?
- If I have an issue what's the approximate time to resolve the issue? (a little ambiguous and will be contingent on the issue, but they should be able to answer it)
- What accounting software are you familiar with in your practice?
- Are there others at your firm?
- What services do you provide?

You want an accountant that is qualified, current and honest. It helps to establish right from the start how the two of you will communicate, what software you'll use, and how the accountant will bill you.

Follow the advice above and find an accountant that's compatible with you. Because the only thing worse than not having an accountant, is having a bad accountant.

And as always, make sure your accountant uses LessAccounting!

[How To Better Manage Your Freelancing Business](#)

[Cash Flow Tips](#)

[Managing Subcontractors](#)

[5 Ways To Better Manage Your Time](#)

[Level Up Your Freelancing Career In Just 5 Days \(A Free Email Course\)](#)

x

Level Up Your Freelancing Career In Just 5 Days (A Free Email Course)

Do you want to create winning estimates, work with better clients, and raise your rates? Find out how to be a better freelancer in this free 5 day email course.

First Name

Email

Powered By [Drip](#)



Leave a message...

Best Community

Share



Blair Illiano · 4 months ago

Great compilation of advice, Allan. This should certainly help those who have no idea what to say to a CPA, except, "Please do my taxes." An accountant should be hired not in the last minute, but beforehand.

Reply Share ›

ALSO ON PLANSCOPE BLOG

WHAT'S THIS?

Should You Subcontract Through Agencies And Consultancies?

1 comment • 4 months ago

Geoff — As someone starting out with A/B testing & CRO, I'm getting a lot of knock-backs from directors because I don't ...

How I Made \$312.50 An Hour Teaching Local Business Owners

2 comments • 10 days ago

Michael Steele — Thank you for this. It's really helpful info for someone who hasn't done this before. Just curious, is it ...

Helping My Blog Better Serve Planscope

6 comments • 4 months ago

Joshua — Why you didn't you just truncate your posts? Did you measure truncated vs. non-truncated and found non- to be the ...

Planscope Now Integrates With mite Time Tracking

1 comment • 4 months ago

Emma — Hey Dunn, I would probably suggest to have a look at Replicon's simple to use cloud based time tracking ...