

# SCORE SouthEast Wisconsin

## How to Hire a CPA?

### JOB DESCRIPTION - Written

Train you to do your own bookkeeping on QUICKBOOKS or other system.  
Set up appropriate Chart of Accounts for your understanding and approval.  
Do tax returns: Federal and State. Compliance with codes and statutes,  
taking advantage of all allowances and depreciations.  
Submit timely reports to you. In early stages of business meet quarterly [or monthly]  
for progress assessment.  
Offer early and on-going business input and advice.

### QUALIFICATIONS

CPA credentials - plus years of experience.  
Member of American Institute of Certified Public Accountants: [www.aicpa.org](http://www.aicpa.org)

### FIT / QUALITIES

Has clients in your type of business. Is familiar with your industry culture and language.  
Compatibility with you. Comfort level. Trust. Speaks directly to you in understandable  
language.  
In your locale, or close by.  
Is expected to be responsive, prompt, and returns your phone calls.  
Strategic partner: Ask for ideas and specific suggestions for operating your business.

### PROCESS

Seek referrals from trusted compatriots – banker, lawyer, insurance agent, business  
acquaintances.  
Interview 3-4-5 candidates. Select the most promising.

After one year review for performance, compatibility and contributions to your business.

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Price of the above-delineated work should relate to contributions to company. The more  
insights, efficiencies and suggestions he/she offers, the better your company will be, and the  
more value contributed.

Some pertinent websites:

<http://www.oscpa.com/docs/pr/HireaCPA-brochure.pdf>

<http://www.entrepreneur.com/money/moneymanagement/bookkeeping/article45628.html>

<http://ezinearticles.com/?Why-Hire-a-CPA-For-Tax-Needs&id=3247246>