

Checklist for Choosing a New Bookkeeper

How to Choose a Bookkeeper for Your Business

Some Questions to Ask...	Your Bookkeeper	Bookkeeper B	Bookkeeper C
Does the bookkeeper keep all your financial records under lock and key when they are not physically present?	Yes		
<i>At Your Bookkeeper, even the mailbox is locked in case your documents arrive on the weekend. In addition, the entire premises are protected by a security system, and all checks and signature stamps are kept in a lockbox behind a dead-bolted door.</i>			
Is the bookkeeper <i>Bonded</i> against theft?	Yes		
<i>Bookkeepers have the best shot of stealing your money. While we screen and check all our employees carefully, we add this measure in case the unthinkable happens.</i>			
Does the bookkeeper provide a confidentiality agreement to keep your customer lists and financial information private?	Yes		
<i>Not only does Your Bookkeeper provide you with a signed confidentiality agreement, but every bookkeeper that works there has to sign one to be employed.</i>			
Is the bookkeeper tech-savvy? Can they scan-and-email documents, use file transfers, and have faxing? Do they text, IM and email? Are they up-to-speed with the latest QuickBooks? Do they know and use QuickBooks Online?	Yes		
<i>We pride ourselves on being the exception to the rule when it comes to bookkeeper-types. We even have the ability to upload your documents to our website for your viewing.</i>			
Is this the bookkeeper's primary source of income, or is it a side-business for extra money?	Yes		
<i>By employing a bookkeeping FIRM, you do not expose yourself to the likelihood of your bookkeeper getting another job or moving on. Because we use standard practices, even if one of our bookkeepers leaves, you are transitioned smoothly to another staff member who uses the same standards and practices.</i>			
Does the bookkeeper have experience in your type of business?	Yes		
<i>Having served over 175 different clients in just under 10 years, we have learned many different types of businesses, and probably have worked with a business model similar to yours. We have been through IRS audits, state non-profit audits, and worked with dozens of accountants.</i>			
Does the bookkeeper have clients who are willing to act as references for their work?	Yes		
<i>We love to have you contact our clients, because our clients love us! Our commitment to serve the needs of our clients has left a line of happy clients in its wake!</i>			
Is the bookkeeper readily accessible to answer questions provide reports, and generally be available?	Yes		
<i>Our office is open every weekday, and email is also automatically forwarded to the bookkeepers' homes. In addition, the owner's cell phone is posted right on our website.</i>			

YOUR BOOKKEEPER, LLC

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