



GUIDE

Top 10 things to think about before changing Accountant

1. Who will you be dealing with and do you get on with them?

Building a strong relationship with your new accountant is vital. You need to make sure that you gel with the person you will be dealing with so you can really make the most out of your relationship.

2. What qualifications do they have?

Check what professional qualifications an accountant has before you engage with them, you wouldn't ask a dentist to fix your boiler, so don't use someone who is not qualified to deal with your accounts and tax. There are different levels of qualification out there so make sure you understand what their professional accreditations mean before signing up.

3. Are they regulated by a professional body?

It is important that your accountant is regulated, this means you have somewhere to go should anything go wrong. Professional bodies set standards and means services must be high quality and are regularly reviewed. Any accountant who is not a member of a professional body should be approached with caution.

4. Are they Proactive?

Do they provide reminders of important dates so you can relax about deadlines? Do they give regular updates to changes in legislation and general advice?

5. Do they make sense?

You don't necessarily want to know the technicalities of how your accounts and tax are calculated and you certainly don't want an accountant who talks jargon. If after your initial meeting you leave confused then maybe it's not the right person for you.

6. Do they embrace new technology?

In today's busy world technology can save huge amounts of time and stress for individuals and business owners. You want an accountant who uses technology that makes your life easier. Also, If your accountant hasn't updated you on making tax digital compliance requirements and how the changes may affect you, you could come unstuck as MTD is rolled out.

7. Can you get hold of them easily?

You don't want to be left in limbo waiting for days for an answer to a simple query so it's definitely worth checking what the turnaround time for queries is, an indication could be how quickly they come back to your initial query. Also make sure there is cover in the team if your regular contact is away.

8. Do they charge for every enquiry?

You need to know whether an accountant is going to charge you on a fixed fee basis or a time basis. It's all very well being quoted a low fee to do your accounts or tax return but if there are lots of extras it can quickly become a false economy to go with the cheapest quote.

9. Have they got experience of dealing with your kind of business?

Before moving to a new accountant it's worth asking what experience they have with your sector and size of business. Whilst not essential it can be helpful if they have existing clients who are similar. For example, an accountant who only deals with sole traders might struggle looking after a fast-growing tech company.

10. Do they provide value for money?

You need to understand what billing system they use, do they offer fixed fees so you know exactly what to expect?

Do you want to change Accountants?

If you are thinking of changing accountants or need one for the first time, [contact Blue Spire](#) to arrange a free, no obligation business review consultation with one of our Directors. We will meet you and discuss your current situation at a time or place that is convenient to you. We'll give you some on the spot ideas and tell you about the services we offer – personalised accounting services from a modern accountancy firm.

BOOK YOUR FREE CONSULTATION

Chichester

Cawley Priory, South Pallant,
Chichester, West Sussex, PO19 1SY
[+44 \(0\)1243 781234](tel:+441243781234)

Brighton

5th Floor Intergen House 65-67 Western
Road Hove East Sussex BN3 2JQ
[+44 \(0\)1273 739533](tel:+441273739533)