MIA SPENCER ADVISORY

Define your accounting needs

Before you ask for a proposal

Circle a priority for each item. Write the result you need and when you need it.

Business / project: _____ Date: _____

Close and reconciliations

Which accounts need review? When must the books be ready?

Priority: Low / Medium / High Desired result or deadline: _____

Management reporting

Which reports and explanations would help you make decisions?

Priority: Low / Medium / High Desired result or deadline: _____

Controls and approvals

Where are roles unclear or approvals difficult to trace?

Priority: Low / Medium / High Desired result or deadline: _____

Audit preparation

Which schedules or evidence must be organized, and by when?

Priority: Low / Medium / High Desired result or deadline: _____

Team capacity

Which tasks can your team own? Which should a firm take on?

Priority: Low / Medium / High Desired result or deadline: _____

My two priorities and what a good outcome looks like

Keep your completed worksheet for your own planning.