MIA SPENCER ADVISORY

Compare accounting firms

When you have proposals

Score each firm: 0 = unclear, 1 = partly addressed, 2 = clear in writing. Mark N/A if an item does not apply.

Firm A: _____ Firm B: _____ Firm C: _____

Fit

What similar work can the firm describe? Who will lead your engagement?

A: ____ B: ____ C: ____ Follow-up: _____

Deliverables

What arrives, how often, and who reviews or explains it?

A: ____ B: ____ C: ____ Follow-up: _____

Pricing

What is included? What triggers extra fees, and who approves them?

A: ____ B: ____ C: ____ Follow-up: _____

Responsibilities

What will your team supply, and what does the firm own?

A: ____ B: ____ C: ____ Follow-up: _____

Handoff

Who owns the files? How do you get records if you change firms?

A: ____ B: ____ C: ____ Follow-up: _____

Questions to resolve before choosing a firm

Compare the written commitments first. Use the scores to spot gaps worth discussing.