

TRUSTING YOUR PROFESSIONAL ADVISORY TEAM: KEY ELEMENTS TO LOOK FOR

In a 2016 poll conducted by the American Association of Individual Investors (AAII), 65% of Americans reported that they don't trust professional advisors with their finances. **Yikes!**

This dismal statistic likely helps explain why less than half of Americans have an advisor at all. While all CPAs are not created equal, you could be risking your financial health by forgoing the expertise of a skilled consultant.



When shopping around for the right advisor, you want to find a strategic partner with your success in mind, not just another number cruncher.

But with over 600,000 licensed CPAs nationwide, how do you shuffle through the prospects and choose the right one?

Here Are a Few Key Considerations:

Transparency

Transparency of fees, of why certain services should be performed, and why others aren't necessary. A good accountant will provide their client with clear communication and rationale for any recommended course of action.

Accessibility

CPAs are not limited to the window of a typical 9-5 job. At one point or another, you will have questions or need advice outside of standard business hours. A mindful and invested CPA is prepared and eager to go the distance for you, providing timely and thoughtful responses to calls, emails and texts.

Credibility

Never hire a CPA without at least checking their basic credentials, which you can check on cpaverify.org. You may also need to ask about other certifications if you're looking for more specialized services such as forensics or valuation services. And last but not definitely not least, any reputable financial consultant should be more than willing to provide references upon request.

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"one-size-fits-all"
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CPA.



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Avoid the "one-size-fits-all" approach when looking for a CPA. Remember that each will vary in their work style, service specialty, knowledge, and level of integrity.

In order to find a trusted professional advisor who has the time, resources and knowledge to support your personal or business needs, you need to be proactive. Go into your meeting prepared with a list of questions, identify your goals and objectives, and never be scared to investigate credibility.

Interested in finding out if we might be a good match for you? Let's connect and start a conversation.

The information provided in this article is for informational purposes only and is not intended to substitute for obtaining tax, accounting, or financial advice from a professional accountant.

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