

# Find the Right Accountant



Discover Things About Accountants Every CEO Needs to Know to  
Transform Your Business

Seek Value and Performance

# Not Just Taxes

Imagine having a professional you trust with your business taxes that also is willing to ask you the hard questions, keeps up with technology and the changing business environment, makes it super easy to work with them, is reliable and even reaches out to you...instead of taking months to return an email. This quick guide using 30 questions will help you find that person. Here, you'll find items that will resonate with your business and satisfy your curiosity if you are entrepreneurial and want to have a better business. Start transforming your business today!

We begin with **5 Goals** that each business needs to consider. You may have more, but we can start here:

Goal 1: Make money & save taxes

Goal 2: Have the right amount of cash

Goal 3: Know the risks and manage them

Goal 4: Operate efficiently

Goal 5: Plan well and execute strategically

In the pages that follow, we'll look at the questions you need to ask before you choose an accountant, or maybe will help you change accountants to the one that's Right for You.

If you get stuck on your journey, visit [6capital.ca](https://6capital.ca) for exclusive resources and tools to help you master your business. I'm a finance, accounting and leadership coach for businesses that want to grow healthy but don't yet have all the tools, systems and people.



*I'm Everett Duerksen, a CPA by profession, entrepreneur by design, teacher, coach, musician and creator and I'm passionate about helping CEO's sing a better tune by orchestrating their finance and accounting (F&A) teams, models, systems and tools. The CEO's I've worked with **discover clarity**, **gain confidence** and have the opportunity to **grow their businesses** in a healthy way.*

## FIND THE RIGHT ACCOUNTANT

### 7 EASY STEPS TO CHOOSE YOUR ACCOUNTING

- 1 There are 30 questions below that you should ask a prospective accountant or accounting team.
- 2 When the accountant responds, match their answer with the closest example in Answer 1, 2 or 3.
- 3 Add up the marks at the bottom of each section and then multiply. You'll get a *Value Score* for each column.
- 4 Add up the 3 *Value Scores* and enter your total.
- 5 Once you've added them all up, transpose those results into these boxes:

	Net SECURE Score <i>page 2</i>	Net SIMPLE Score <i>page 3</i>	Net STRATEGY Score <i>page 4</i>
The totals from each section are:	<input type="text"/>	<input type="text"/>	<input type="text"/>

- 6 Now use the SECURE, SIMPLE, STRATEGY questions to record your scores from 2 other accountants.

*Note: if any of the firms score lower than 20 in any of the SECURE, SIMPLE, STRATEGY sections,  
remove them from the short-list.*

Firm #1	<input type="text"/>	<input type="text"/>	<input type="text"/>
Firm #2	<input type="text"/>	<input type="text"/>	<input type="text"/>

- 7 Continue the discussion with the firm that scores the highest to ensure the relationship will work for both.

# SECURE

Your accountant should keep you SECURE, but not just safe from tax rules. Their job is to understand your business and your industry so that they can help you to make good decisions...and keep you saying "No" to bad decisions.

	Answer 1		Answer 2		Answer 3	
Do you have a process to ensure my filings are done less than 2 months after year end?	That's impossible	<input type="text"/>	No, we wait for you to bring it in	<input type="text"/>	Yes, we ensure you are scheduled in at the right time and help you achieve it	<input type="text"/>
How many times do you reach out to your clients during the year in some form?	We wait until you have a problem and call us	<input type="text"/>	At least once when its time for your year end	<input type="text"/>	We connect frequently with current issues and updates	<input type="text"/>
Do you provide me with a tax risk assessment to help me understand my risk areas?	I don't know what that means	<input type="text"/>	We'll talk about anything that is risky	<input type="text"/>	Yes, we analyze multiple risk areas and show you exactly where you fit	<input type="text"/>
How do you notify me of issues you've identified or current concerns specific to my industry?	We are unable to do that	<input type="text"/>	If anything pops up we'll let you know	<input type="text"/>	We actively look for current issues and highlight them confidentially to you	<input type="text"/>
Do you offer audit insurance to protect me from the cost of CRA reviews?	No. I'm not familiar with those programs	<input type="text"/>	No, we're aware of it but haven't implemented it	<input type="text"/>	Yes in some provinces, but not all are eligible	<input type="text"/>
How do you keep me updated on my tax balances and how to stay ahead?	We don't, you'll get notices from CRA	<input type="text"/>	We print you an instalment sheet at year end	<input type="text"/>	We calculate your ideal instalments, and then remind you quarterly and look for changes	<input type="text"/>
What method do you use to ensure my projects don't get missed?	We have a list of those but it isn't up-to-date	<input type="text"/>	We have a spreadsheet where we track projects	<input type="text"/>	We use advanced software to track, STRATEGY and remind us of upcoming tasks	<input type="text"/>
How does your team stay updated on all the compliance changes?	The rules don't really change that much	<input type="text"/>	We take a couple of courses each year	<input type="text"/>	We actively review all changes and determine which clients they may apply to	<input type="text"/>
How do you price your work?	We charge for each hour we're doing work	<input type="text"/>	We give you a bill at the end of the project for whatever we did	<input type="text"/>	We provide a fixed upfront price to accomplish all projects for the next 12 months	<input type="text"/>
How often do you look at my data so that I can correct errors earlier?	We don't have the ability to do that	<input type="text"/>	We check things at the year end and provide you with adjustments	<input type="text"/>	We watch the books frequently during the year to flag items of concern and incomplete tasks	<input type="text"/>

## Now its time to add up all the SECURE marks:

Add up how many you marked in each column	Total marked (max 10)	<input type="text"/>	Total marked (max 10)	<input type="text"/>	Total marked (max 10)	<input type="text"/>
Now multiply the total marked by the multiplier to get your Value Score	Multiplier Value Score (max-10)	<input type="text" value="-1"/>	Multiplier Value Score (max 10)	<input type="text" value="1"/>	Multiplier Value Score (max 30)	<input type="text" value="3"/>
Now add up each of the 3 Value Scores	Your net SECURE score for this accountant is:	<input type="text"/>				

It is possible to see a negative net SECURE score (less than zero). Keep looking for an alternative accountant.

# SIMPLE

Your accountant should make it easier for your finance team to do their work. They do this by giving you reminders, providing tools and expertise for your problem areas, and making your dreaded tasks more efficient.

	Answer 1		Answer 2		Answer 3	
Do you use electronic signatures to save me time and printing costs?	No, we don't use those features	<input type="text"/>	We can but prefer not to	<input type="text"/>	Yes, we prefer to reduce our footprint and have a secure esignature platform	<input type="text"/>
Can I video call with you so that we can be face to face when talking?	No we are only able to meet in person so you need to be in the same region as us	<input type="text"/>	Only a few people on our team can meet that way, so it might work	<input type="text"/>	Yes, we like to see you and be able to share the presentation with you	<input type="text"/>
Do you have an online location I can access my completed statements and reports?	No, we can mail them to you or you can pick them up	<input type="text"/>	We either mail or email you the completed items	<input type="text"/>	Yes, we have a dedicated secure location where you can access anything we've done together	<input type="text"/>
Do you work with cloud bookkeeping specific to my industry so we can collaborate easier?	No, we still like the desktop versions	<input type="text"/>	We do sometimes, but only have a few clients using that	<input type="text"/>	Yes, we know the value of cloud collaboration is actually safer and better for your business	<input type="text"/>
Are there multiple people on your team that that understand my industry whom I can reach out to with questions?	We'd prefer if you just talk to the partner	<input type="text"/>	It changes every year, so just try a few of us and someone will respond	<input type="text"/>	Yes, your business is assigned directly to a team who will find the correct person to answer you	<input type="text"/>
Do you charge me when I phone or email with a question?	Yes, we charge for calls and emails	<input type="text"/>	Yes, we'll add that time to the year end cost and bill you then	<input type="text"/>	No, you can call and email whenever and we only charge if a new project is started	<input type="text"/>
How quickly do you respond when I have a question or concern?	We're pretty busy, so it depends on what else we're doing	<input type="text"/>	We like to get back to you in a couple of days if possible	<input type="text"/>	We have a system that ensures we respond within 24 hours, if not right away.	<input type="text"/>
Do you offer monthly payment plans to help me with cash budgeting?	No, we don't know the price until we're done so that wouldn't work	<input type="text"/>	That sounds good but we haven't set that up yet	<input type="text"/>	Yes, because we price upfront we can easily determine the monthly amount and set that up	<input type="text"/>
If I need some advanced help, will you connect me with the right people?	We don't usually connect with experts or specialists	<input type="text"/>	We ensure all service goes through us, so we don't risk losing you	<input type="text"/>	Yes, we have an extensive network of other professionals that work with us in helping you	<input type="text"/>
How do you help me remember when I have to give you my documents?	We can't remind everyone. Hopefully you'll remember	<input type="text"/>	We send you a note a few months after year end to send us your things	<input type="text"/>	We plan 12 months in advance and send you multiple reminders when things will be needed	<input type="text"/>

## Now its time to add up all the SIMPLE marks:

Add up how many you marked in each column	Total marked (max 10)	<input type="text"/>	Total marked (max 10)	<input type="text"/>	Total marked (max 10)	<input type="text"/>
Now multiply the total marked by the multiplier to get your Value Score	Multiplier Value Score (max-10)	<input type="text" value="-1"/>	Multiplier Value Score (max 10)	<input type="text" value="1"/>	Multiplier Value Score (max 30)	<input type="text" value="3"/>
Now add up each of the 3 SIMPLE Value Scores	Your net SIMPLE score for this accountant is:	<input type="text"/>				

It is possible to see a negative net SIMPLE score (less than zero). Keep looking for an alternative accountant.

# STRATEGY

Your accountant should have a STRATEGY to help you grow your business. They understand your industry, use strategic conversations about your success, and keep you accountable to do what you said you would.

	Answer 1		Answer 2		Answer 3	
How do you help me look ahead in my business?	If you have questions we'll try to answer them	<input type="text"/>	We don't do that often, but could find some tools to help	<input type="text"/>	We proactively plan alongside you with a proven set of tools and processes that ensure you move ahead	<input type="text"/>
Will you tell me if something I'm doing doesn't align with my plan or other businesses like mine?	Not really sure how we'd know that; maybe if you ask	<input type="text"/>	If you tell us your plan we can look at it and see if there are any problems	<input type="text"/>	Yes, we keep your plan front and center and routinely track your progress	<input type="text"/>
Is your team entrepreneurial like me or are you more like traditional accountants?	Not really sure of the difference	<input type="text"/>	We work with some entrepreneurs but they don't really fit into our model	<input type="text"/>	Yes, we love growth minded businesses because that's who we are as well	<input type="text"/>
Will you push me to hit new targets and goals specific to my business and industry?	We don't really do that	<input type="text"/>	We could likely help you with putting some of those together	<input type="text"/>	Yes, we track your key targets and followup with you at a scheduled time	<input type="text"/>
What examples do you have of clients who succeed from working with your firm?	We don't know whether our clients would consider themselves successful	<input type="text"/>	We have a few clients that we think have done very well	<input type="text"/>	We track the growth of our clients according to their version of success. An example is...	<input type="text"/>
When do you begin working with us on our plan?	We aren't equipped to build a plan for you	<input type="text"/>	If you tell us what kind of plan you want, we we'll give you a quote to help build it	<input type="text"/>	From day 1 in your onboarding we are looking forward at the plan for your success	<input type="text"/>
How do I know in advance which projects you'll be working with me on this year?	We don't really lay that out. When you bring in your items or call us, we can help you	<input type="text"/>	Well, we'll be doing the year end and likely some other returns with CRA	<input type="text"/>	We provide an annual map of the projects that will move your business forward this next year	<input type="text"/>
Do you provide a guarantee?	No	<input type="text"/>	No, but we'll cover any penalties that come from us filing anything late	<input type="text"/>	Yes, we guarantee that we'll do what we say. You'll do what you say	<input type="text"/>
How can I provide feedback about my overall satisfaction?	If you have a problem, please let us know	<input type="text"/>	Please tell us if we've done something wrong	<input type="text"/>	We ask you to rate our service, and then give you the opportunity to respond in confidence	<input type="text"/>
How do you try and hold me accountable to be a better businessperson and succeed in my industry?	It's not really something we do	<input type="text"/>	If you're breaking some rules, we'll let you know	<input type="text"/>	We ask you to show up, fess up and get unstuck in a quarterly conversation	<input type="text"/>

## Now its time to add up all the STRATEGY marks:

Add up how many you marked in each column	Total marked (max 10)	<input type="text"/>	Total marked (max 10)	<input type="text"/>	Total marked (max 10)	<input type="text"/>
Now multiply the total marked by the multiplier to get your Value Score	Multiplier Value Score (max-10)	<input type="text" value="-1"/>	Multiplier Value Score (max 10)	<input type="text" value="1"/>	Multiplier Value Score (max 30)	<input type="text" value="3"/>
Now add up each of the 3 STRATEGY Value Scores	Your net STRATEGY score for this accountant is:	<input type="text"/>				

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