



FREE  
GUIDE

HOW TO BUILD YOUR

# Financial *Dream Team*

[www.hliaccountingservices.com](http://www.hliaccountingservices.com)

# Welcome!

When it comes to your business finances, you can't do it ***all*** alone. To build a sustainable business, you need a team of trusted advisors on your side.

We're going to break down the roles of each of the members of your financial dream team and share a few people you may want to interview for your business!

## DREAM TEAM OVERVIEW



CPA



BOOKKEEPER or  
ACCOUNTANT



BANKER



INSURANCE AGENT



ATTORNEY

# Due dilligence

Before trusting someone to be an advisor for you and your business, make sure to do your due diligence and ensure they're going to be a good fit!

## **DUE DILLIGENCE CHECKLIST**

☐

Ask about their experience serving businesses in your industry

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Read reviews and ask your peers for their recommendations

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Don't be afraid to interview multiple options and request quotes

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Double-check their licensure and certifications

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Carefully review their service contracts before signing

# Want to learn more?



We're here to help when it comes to custom accounting services, HLI Accounting Services has been designed with the small business and entrepreneur in mind!

LINK IN BIO

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