# Bookkeeper Interview Checklist

## Background & Experience

* ☐ How long have you been working as a bookkeeper?
* ☐ What types of businesses/industries have you worked with?
* ☐ Do you have experience with businesses similar in size to mine?
* ☐ Are you a certified bookkeeper, CPA, or QuickBooks/Xero advisor?

## Services Offered

* ☐ What specific bookkeeping services do you provide (monthly reconciliations, payroll, accounts receivable/payable, tax prep support)?
* ☐ Do you provide financial statements (Profit & Loss, Balance Sheet, Cash Flow) on a regular basis?
* ☐ Do you handle sales tax reporting, 1099 preparation, or other compliance tasks?
* ☐ Are you OK working with and communicating with my CPA/tax preparer throughout the year if needed?

## Technology & Processes

* ☐ What accounting software do you use (QuickBooks, Xero, Wave, spreadsheets, etc.)?
* ☐ Are you comfortable working with my current software or would you recommend switching?
* ☐ How do you ensure accurate categorization of income and expenses?
* ☐ What systems do you use to exchange documents (secure portals, cloud storage, email)?
* ☐ How do you back up financial data and protect against data loss?

## Communication & Reporting

* ☐ How often will I receive financial reports?
* ☐ What’s your preferred method of communication (email, phone, Zoom, in-person)?
* ☐ How quickly do you respond to client questions?
* ☐ Will I be working directly with you or with a team?

## Security & Confidentiality

* ☐ How do you keep my financial information secure?
* ☐ Do you carry professional liability or errors & omissions insurance?
* ☐ Do you have confidentiality agreements in place?
* ☐ Do you outsource overseas?

## Fees & Engagement

* ☐ How do you charge (hourly, monthly flat fee, package pricing)?
* ☐ What’s included in your standard fee?
* ☐ Are there extra charges for catch-up work, year-end adjustments, or tax prep collaboration?
* ☐ Do you require a contract or engagement letter?

## Fit & References

* ☐ What do you enjoy most about working with small business clients?
* ☐ Can you provide references from current or past clients?
* ☐ What sets you apart from other bookkeepers?
* ☐ How do you help business owners understand their numbers (not just record them)?