

How Should I Choose a CPA?

First, decide what you want from your CPA. While all CPAs meet the same basic education, training and licensing requirements, not all provide the same range of services. Analyze your present and future financial needs, considering these kinds of questions.

- Will you need help with personal financial issues, individual or corporate tax returns, retirement, estate or college planning? Are you seeking investment help?
- Do you need financial statements prepared for your business? Must those statements be audited or reviewed? Will you need special financial reports for government agencies?
- Do you want help preparing a personal or business loan application?
- Will your business need specialized services, such as technology installations, strategic planning, electronic commerce assurance or cost management studies?

After you have determined your goals, the next step is to seek recommendations from people who might have consulted with CPAs for similar reasons. You might turn to friends and relatives, colleagues and business contacts or to other professionals, such as bankers, attorneys and insurance agents. CPAs are also listed in phone directories, and most state CPA societies offer help in locating practitioners.