



Palmetto Partners

Palmetto Partners' 12 Key Matching Factors

Below are some questions we consider when partnering you with the best accountant for your business needs. If your answers don't match with what your current accountant provides, contact us and let's see how we can help!

1. **Industry experience:** Give a brief description of your business/ industry.

2. **Accounting firm size:** Do you prefer a large firm, sole practitioner or in-between? Why?

3. **CPA vs Non-CPA:** What is your preference and why?

4. **Location/proximity to your office:** Do you prefer someone local?

5. **Method of communication:** Do you prefer by telephone? Email? In person?

6. **Level of contact:** Would you like to be contacted monthly? Quarterly? Annually? Why?

7. **Services offered:** What type of help do you wish to receive (i.e., Compliance work, payroll, tax planning)?

8. **Accountant's business and tax philosophy:** Do you prefer a more fiscally aggressive or conservative accountant?

9. **Accounting budget:** What is your business' budget for receiving accounting guidance?

10. **Years in business:** Do you prefer a firm that has a certain number of years of experience?

11. **Response time:** Do you require service that is on the same day or within the week?

12. **Business and personal dreams:** What goals would you like to achieve?
