

A high-angle, close-up photograph of a white Apple keyboard and a white Apple mouse on a light-colored desk. The keyboard is on the left, and the mouse is on the right. The background is a dark, textured surface, possibly a chair or a desk mat.

5 KEY QUESTIONS TO ASK

before hiring a CPA

Weber CPA

Hiring a CPA is a big decision.

There are plenty of CPAs who will do your taxes.

But most business owners crave more than “just a CPA.” They crave a trustworthy person to help them make wise decisions.

We’ve created a business advisory program that gives recurring access to great business and tax advice, allowing you to tackle today’s problems and focus on tomorrow’s opportunities.

With today’s ever-changing tax codes, you need wisdom and advice from someone you can trust.

So before you make your decision and hire a CPA, here are 5 questions to be sure you ask.

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1 Is this someone I can trust?

Think about it: you're going to be sharing all kinds of details about your business with your CPA. These are details you might not even talk about with your employees, friends, or loved ones. During World War II, the phrase "*loose lips sink ships*" became popular, and remains true today.

At Weber CPA, we treat every conversation with the strictest confidentiality. We realize your trust in us is at the core of our relationship, and we take it seriously. We want your level of trust in us to grow with each and every interaction we have.

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2 Are they willing to share their experience, credentials, and references?

Make sure they are willing to share their experience and credentials with you. Ask them things like, how long have you been in business? Are you a CPA or studying for your CPA exam? Are you certified in the state? Then be sure to ask for three references from current clients, and call each one of them. Ask about the firm's trustworthiness, communication, accuracy, and ability in hitting deadlines.

At Weber CPA, we gladly share our experience, credentials, and references. We've been serving our clients for 20 years with Jeff as our CPA. Our best marketing tool is word of mouth, so we know a good word from a client is priceless.

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3 What services do I need now and in the future?

You may just need help with your returns this year. But think beyond that when choosing a CPA firm. There are lots of tax software options and CPA firms to choose from when it comes to tax returns. But how many of them are asking you about your future financial goals?

Weber CPA realizes we need to understand the past to complete your returns, but we want to spend more time planning for your future. This is what we call a windshield approach versus a rearview mirror mindset - an approach we use with every new project and client.

4 Can they represent me with the IRS?

If the dreaded IRS letter ever arrives in the mail, it's not in that moment that you want to find out the firm who did your return doesn't have experience dealing with the IRS. So ask ahead of time about their IRS experience. How many times have they interacted with them on behalf of their clients? How recent was that interaction? What were the outcomes?

Jeff Weber has years of experience interacting with the IRS. And while we do everything possible to avoid that letter coming to your mailbox, we will lock arms with you and be there every step of the way should it happen. Jeff is known by the IRS as a man of faith and integrity, and that benefits his clients.

5 Do I enjoy working with them?

This may seem silly, but your relationship with your CPA may be one of the most important business relationships of your career. So you might as well enjoy interacting with them! What do their references say about their people skills? When you met them, did you feel good about your time together?

Ask any of Weber CPA's clients and you'll hear the same thing over and over: that Jeff is so much more than a CPA. He is a trusted advisor, a great listener, helps clients make wise decisions, and really cares about clients' businesses and families.

Don't settle for "just a CPA." Connect with a trustworthy person to help you make wise decisions.

We'd love to talk to you in person!

Call Jeff today at 813.500.0000 to schedule a free consultation.

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