

Choosing an Accountant – Checklist Form

Notes:

Checklist provided free of charge by www.ContractorCalculator.co.uk.

If you would like to suggest further information to be included on this form then please email us at operations@ContractorCalculator.co.uk

Further useful resources:

[Choosing an Accountant for Your Limited Company](#)

[First Timers Guide to Contracting](#)

[Setting Up Your Limited Company](#)

[Moving From an Umbrella Company to a Limited Company](#)

[Limited Companies – Dedicated Section](#)

Company and Contact Details:

Company name:	
Tel:	
Contact name + position: (Accountant / Sales etc)	
Date spoken to:	
Recommended by: (Perhaps by a friend/colleague)	

Company history and Information:

Year started:	
Number of contractor clients: (Sometimes high volumes of clients can result in a less personal service.)	
Specialists in Contractors or general services?	

Fees and Calculations:

Fees: <i>(Fixed/Percentage etc)</i>	
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Services offered:

Set up services offered: <i>(Creating Ltd company, registering, etc.)</i>	
Annual services included:	Annual accounts (Y / N) Payroll (Y / N) Self Assessment (Y / N) P11D Quarterly VAT returns (Y / N) References (mortgages etc) (Y / N)
Services NOT included: <i>(and additional fees)</i>	
Your responsibilities: <i>(How much company administration are you required to do each year. E.g. VAT preparation, raising invoices, etc)</i>	
Tie in Period / lock in fee: <i>{Is there a minimum period}</i>	
Client charters: <i>(Guarantees of service level or money back etc)</i>	
Dedicated account manager or helpdesk? <i>(It is more useful to always deal with the same person.)</i>	
Qualifications of dedicated account manager (if applicable). <i>(Are they a qualified accountant or administration personnel?)</i>	

Other Comments & Information: