

# THE GREEN BOOK CHECKLIST – Finding the Right Accountant





## Checklist: Finding the right accountant

1. How long have you been in practice?	Notes:
2. Are you a CPA (Certified Practising Accountant)?	<input type="checkbox"/> Yes <input type="checkbox"/> No Notes:
3. What other qualifications do you have?	Notes:
4. How many clients do you have?	Notes:
5. Of those clients, how many own investment property/ies?	Notes:
6. How many of your clients own their investment property in trusts? What type of trusts are they owned in?	Notes:

<b>7.</b> How many audits have you had?	Notes:
<b>8.</b> What area do you specialise in (e.g. business, property, shares, personal tax etc.)?	Notes:
<b>9.</b> Do you personally own investment property/ies? If yes, how many and for how long have you owned them?	<input type="checkbox"/> Yes <input type="checkbox"/> No Notes:
<b>10.</b> What is your knowledge of asset protection structures with regard to investment property?	Notes:
<b>11.</b> When purchasing an investment property, what entity do you recommend I personally purchase in and why?	Notes:
<b>12.</b> Are you prepared to push the envelope with respect to tax law? Give examples.	<input type="checkbox"/> Yes <input type="checkbox"/> No Notes:

<p><b>13.</b> Do you lodge tax returns electronically?</p>	<p><input type="checkbox"/> Yes   <input type="checkbox"/> No</p> <p>Notes:</p>
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<p><b>14.</b> How do you charge for your time i.e. what is your schedule of fees?</p>	<p>Notes:</p>
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<p><b>15.</b> How quickly can you turn around my queries?</p>	<p>Notes:</p>
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<p>Additional comments</p>
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