swift accountancy

Questions to ask before changing accountants

A short checklist for your first conversation.

1. Agree what you want help with

- Which tasks will the new accountant handle, and which will stay with you?
- Do you need bookkeeping, a review of your own records, VAT returns, company accounts, Corporation Tax or payroll?
- Is catch-up work needed before the ongoing service can begin?

2. Check the dates and responsibility

- What filing and payment deadlines are approaching?
- Which periods and outstanding work will the current accountant complete?
- From what date will the new accountant handle each agreed task?

3. Confirm the records and software

- Which records, previous accounts and working papers will be needed?
- Who will arrange the handover, with your permission?
- Who controls the software subscription, and how will access be provided?
- Can you retain access to your records after the change?

4. Understand the fee

- What does the fee include, including submissions? What costs extra?
- Are there notice arrangements or outstanding fees to resolve with your current accountant?

5. Complete the appointment

- What identity checks and engagement documents are required?
- Which HMRC services need agent authorisation, and how will you provide it?
- Who will confirm that the handover and required access are complete?

HMRC requires authorisation before an agent can deal with it on your behalf. Your agent should explain how. Read HMRC guidance.

To discuss your next step: swiftlondon.co.uk/contact/ or info@swiftlondon.co.uk.