BALANCED NUMBERS
ACCOUNTING SERVICES

10 Questions to Ask Before Hiring a Bookkeeper

Use this quick guide to find a bookkeeping partner who will keep your records accurate, communicate clearly, and help you stay confident in your numbers.

1. What bookkeeping experience do you have?
Look for experience with businesses similar to yours, not just general data-entry experience.

2. Which accounting platforms are you certified in or experienced with?
Ask about QuickBooks Online, Xero, payroll systems, and the other tools your business uses.

3. What is included in your monthly bookkeeping service?
Clarify whether reconciliations, transaction coding, financial reports, accounts payable/receivable, payroll support, and sales tax are included.

4. How often will my bank and credit card accounts be reconciled?
Monthly reconciliation is a core bookkeeping control. Bank-feed activity alone does not mean an account is reconciled.

5. How do you handle bookkeeping errors or cleanup work?
A good bookkeeper should identify prior-period problems, explain them clearly, and outline how they will be corrected.

6. What financial reports will I receive, and how often?
At minimum, discuss the Profit & Loss and Balance Sheet and how the reports will be reviewed for accuracy.

7. How will we communicate and how quickly do you typically respond?
Agree on a communication method, response expectations, and how questions or missing information will be handled.

8. How do you protect my financial information?
Ask about secure document sharing, passwords, user permissions, backups, and how access to your accounting system is managed.

9. How do you work with my tax preparer or CPA?
Your bookkeeper should keep the books tax-ready and coordinate efficiently with the professional preparing your tax return.

10. How is your pricing structured, and what could cause my fee to change?
Know whether pricing is fixed, hourly, or tiered and what cleanup work, additional accounts, or expanded services may cost.

Tip: The best fit is not necessarily the cheapest option. Look for someone who combines accuracy, reliability, clear communication, and a process that fits your business.

Balanced Numbers, LLC
Experienced bookkeeping and accounting support for service-based businesses.
Accurate. Organized. Tax-ready.