

How to Change Accountants

People tend to think changing accountants is more difficult than it needs to be. The reality is, we make this process hassle free and as painless as possible, summarised by these three key steps:

1 Ensure you have a good mutual fit with your new accountant.

- a. Trust your instincts. You'll know if it's a good fit for you and your business. Your accountant and their team should share similar values with you. At Advivo Accountants and Business Advisors our initial meeting is always free of charge and obligation free because it's important to ensure the people/businesses we meet with are as much of a fit for us as we are for them.
- b. Understand the pricing structure and what is included. Our website details our Monthly Service Programs, and how these can be tailored for your business. Once we've discussed and agreed on a program which is best suited for you and your business, we'll provide an online authority/engagement letter. This will confirm what has already been agreed and is a very simple online process to follow.
- c. Once your decision is made and your online authority/engagement letter is completed, it's time to let your previous accountant know.

2 Letting your previous accountant know:

- a. Many prefer to call their previous accountant themselves to advise of their decision. Others prefer to quickly move on and have no further contact with their previous provider. This is fine too. We will always send your previous accountant an 'ethical clearance letter' advising of your decision and requesting any relevant information.
- b. You need not have any further contact or dealings with your previous accountant if you don't want to. We can handle everything.

3 Let's get into it!

- a. Here at Advivo Accountant's and Business Advisors we'll be working with you from day 1 to understand you, your business and your goals. We'll then set about helping you achieve them in the most effective way.

That's it!

This is really as complicated as it needs to be in most cases. We do have a few other smart tips you could carry out as a matter of course which could help to make the transition even smoother for you.