

CHOOSING AN OUTSOURCING PROVIDER CHECKLIST

When searching for a provider, look for a partner – a firm capable of establishing a relationship with the right levels of communication and trust.

Here's a checklist to help you evaluate an outsourced accounting and finance partner:

- Many years of experience providing outsourced accounting and financial solutions
- Specializes in your industry
- Offers access to a suite of advisory offerings that complement accounting and finance
- Experienced and trained on accounting processes and systems
- Defined team roles and responsibilities
- U.S.-based team that can perform activities remotely
- Communication is real-time and the team is readily available for questions
- Culture is similar
- A seamless onboarding transition process with agreed-upon deadlines
- There is effective documentation and shared intellectual property
- They can build or optimize your accounting systems to automate and integrate all your financial data
- Security protocols are in place for your financial data
- You have shared access to the accounting software platform



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