Gondaliya CPA
Your Growth Partner

Healthcare CPA Selection Checklist

Ten questions before you sign an engagement letter

Gondaliya CPA Professional Corporation | Licensed Ontario CPA Firm

Work through these ten before your consultation. A general firm will answer the tax questions well. It is the college and billing questions that separate the two.

- [ ] 1 **Healthcare clients on file**
  Ask how many, and which colleges.
- [ ] 2 **College rules understood**
  CPSO, RCDSO and share ownership limits.
- [ ] 3 **Certificate renewal tracked**
  Annual, and separate from corporate filings.
- [ ] 4 **OHIP reconciliation**
  Billings matched to payments received.
- [ ] 5 **Mixed supplies apportioned**
  Exempt against taxable, with ITCs split.
- [ ] 6 **Remuneration modelled**
  Salary and dividend mix, reviewed annually.
- [ ] 7 **Documented in minute book**
  Resolutions supporting the pay decision.
- [ ] 8 **Overhead splits in writing**
  Shareholder agreement kept current.
- [ ] 9 **Fee quoted in writing**
  Fixed, with the scope stated before work starts.
- [ ] 10 **CRA representation included**
  Confirmed in the engagement letter.

PRO TIP

Ask any prospective firm which colleges they deal with.
The answer tells you quickly whether they work in healthcare or simply accept healthcare clients.

What happens next

1 Practice reviewed

2 Fixed fee quoted

3 Onboarding done

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