Gondaliya CPA
Your Growth Partner

Choosing an Online CPA Checklist

Gondaliya CPA Professional Corporation · Registered Ontario CPA Firm

Twelve questions to ask before you engage an online CPA

Ask every firm the same questions, and compare the answers side by side.

- [ ] **Are they registered with CPA Ontario?**
  A registered firm can be verified in the CPA Ontario directory.
- [ ] **What is their stated response standard?**
  Ask for it in business days, and ask what happens in busy season.
- [ ] **Is the fee fixed and annual, or hourly?**
  A fixed fee tells you the cost before the work starts.
- [ ] **Is sales tax shown separately from the fee?**
  It should appear on its own line, not folded into the quote.
- [ ] **Do they handle bookkeeping and the T2 together?**
  One file avoids the handoff gaps between two providers.
- [ ] **Can they file your GST/HST returns as well?**
  Returns and the books should be prepared from the same records.
- [ ] **Do they run payroll and the remittances?**
  Source deductions have their own deadlines and penalties.
- [ ] **Will they prepare compiled statements?**
  Lenders usually want statements under CSRS 4200.
- [ ] **Do they have clients in your industry?**
  Sector rules are learned on real files in that sector.
- [ ] **Will they represent you in a CRA audit?**
  This is a separate service, and not every firm provides it.
- [ ] **Does their software work with yours?**
  You should not have to change systems to suit the firm.
- [ ] **Who will actually be doing your work?**
  Ask to be told the name, not just the firm.

Prepared by Gondaliya CPA Professional Corporation, a registered Ontario CPA firm since 2013. General information only, not advice for a specific situation. Call 647-212-9559 to discuss your file.

647-212-9559 · info@gondaliyacpa.ca
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