

Is Your Bookkeeper up to Scratch?



To help you evaluate the services provided by your current bookkeeper and their organization, or to help you evaluate a new bookkeeping organization, please feel free to use the following checklist –

(please note that this checklist is not exhaustive and should be used as a guideline only)

Services Provided	Yes	No
Does your bookkeeper have formal qualifications? (Software courses are not bookkeeping qualifications) What are they?		
Is your bookkeeper a Registered BAS agent?		
Does your bookkeeper have Professional Indemnity Insurance?		
Is your bookkeeper a member of a professional association that keeps them up to date with changes to tax regulation requirements? Which association?		
Has your bookkeeper provided you with their Terms of Engagement?		
Does your bookkeeper have a Confidentiality and Privacy Policy in place?		
Does your bookkeeper have extensive knowledge and experience with the accounting software package that you use?		
Is your bookkeeper able to offer more than just a bookkeeping service?		
Can your bookkeeper offer you business support?		
Can your bookkeeper offer software training and support?		
Is your bookkeeper able to deliver your accounts to your accountant in a manner that saves you money?		
Is your bookkeeper able to assist you via remote access to your computer?		
Does your bookkeeper guarantee their service?		

Did you answer NO to any of these questions?

Perhaps it is time to reassess the Bookkeeper you are currently using.

**For an obligation free discussion
of your Bookkeeping requirements
please call Direct Management on
1800 15 33 70
www.directmanagement.com.au**

