

Checklist For Starting an Accounting Firm

Business Planning

- Define niche and services
- Research target market
- Set business goals
- Forecast financials
- Plan marketing strategies

Legal Requirements

- Register business entity
- Obtain EIN from IRS
- Secure state licenses
- Comply with local permits
- Purchase liability insurance

Office Setup

- Choose a location
- Purchase office equipment
- Setup IT infrastructure
- Design client meeting areas
- Establish record-keeping systems

Staffing and Operations

- Hire qualified accountants
- Train support staff
- Develop standard procedures
- Implement CRM software
- Schedule regular audits

Client Acquisition

- Build a website
- Network with businesses
- Offer introductory rates
- Utilize social media marketing
- Attend industry events

Financial Management

- Set up business bank account
- Manage client billing
- Track expenses and income
- Prepare for tax season
- Optimize cash flow

Go-to Resources for Starting an Accounting Firm

Client Relationship

- [HubSpot CRM](#)
- [Salesforce](#)
- [Zoho CRM](#)

Marketing Tools

- [Mailchimp](#)
- [Hootsuite](#)
- [Canva](#)

Business & Accounting

- [ZenBusiness](#)
- [Northwest Registered Agent](#)
- [FreshBooks](#)
- [MyCorporation](#)

Useful Tools

- [Logo Generator](#)
- [Invoice Generator](#)

*All of the resources are clickable links