



Working with Your Client's CFO

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"The company CFO is the key contact for outside accounting firms. Listen and ask a panel of CFOs what they expect from their accounting firm, why they chose a firm, what pleases them and what might cause them to make a change. This is an opportunity for unvarnished client feedback from representatives of various size clients in differing industries."

Considerations for choosing a firm should include:

- 1. Fees
- 2. Service
- 3. Industry specific knowledge
- 4. Well trained staff
- 5. Reputation with regulators
- 6. Ability to clearly communicate with the audit committee.

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"S.P.A.I.N":

- "S" Support
- "P" Partnership
- "A" Advice
- "I" Intermediation
- "N" Neutrality

"S.P.A.I.N":

• Might cause company to change firms if "S.P.A.I.N." does not work

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- Can firm handle a growing company?
- Has there been a partner transition?
- · Has there been a problem/screw up?

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From a public company perspective:

- Can the firm handle public company issues and the related compliance with public company reporting requirements?
- Is the firm well versed in specific industry accounting issues?

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From a young company perspective:

- Is the firm able to set up the structure correctly and appropriately to allow company to operate efficiently at both present level and as it grows.
- Ability of firm eventually to take the company public or to be able to team up with "Big 4" firm

