



# Selecting a CPA Firm

Relationships go deep between a CPA firm and a client: at least we feel they do. But every now and then a relationship goes sour and a business owner says it's time to start looking around. That's when we get the call.

Often the owner or CFO doesn't necessarily have a long list of issues with their CPA firm, but more of a sense that things could be done in a more effective, timely fashion with a greater level of expertise. That's when we get the call.

Many owners or CFOs still feel the sting of tax consequences and they'd like to be more pro-active for the

next tax season, but they don't feel they're getting what they need from their current firm, so they ask their peers. That's when we get the call.

In response to receiving an inquiry, we like to ask a lot of questions and have some deep discussions. But, we also find there's some homework a prospective client can do that will make the process easier and more meaningful.

Here are our tips for selecting a CPA firm:

## 1.) Super-Size It?

It might work for McDonald's but not every client wants to "super-size it" and go with a big accounting firm. Who wants to be a small fish in a big bowl when it comes to your finances? Look for a firm that will give you the attention you need with your account. If you want to have access to a Partner, as well as a working team, then a mid-sized firm like RBF Co is the way to go. If you

"I just wanted to be a businessman, and to me, the best way to understand business was to be an accountant."  
- Aubrey McClendon



## RBF Services:

### Accounting and Auditing Tax Services

### Management Consulting Services

- Accounting Systems
- Business Acquisitions
- Business Startups
- Business Process Improvement
- Financing
- General Business Counsel
- Succession Planning
- QuickBooks

### Personal Financial Counseling

## Industry Experience:

### AgriBusiness Services

- Egg Processors
- Farming Operations
- Fertilizer Producers
- Food Processors
- Silo Manufacturers

### Construction Industry Services

- Aluminum and Glass Contractors
- Bridge Contractors
- Building Supply Companies
- Commercial Building Contractors
- Drywall Contractors
- Landscaping Contractors
- Masonry Contractors
- Mechanical Contractors
- Plumbing Contractors
- Residential Building Contractors
- Steel and Iron Fabricators

### Healthcare Services

- Assisted-Living Facilities
- Continuing Care Retirement Communities
- Healthcare Foundations
- Home Care Nursing Associations
- Hospital Authority
- Individual & Group Medical Practices
- Medical Billing Services
- Nursing & Rehabilitation Centers
- Personal Care Facilities
- Pharmaceutical Distributors
- Pharmacies
- Sub-acute Facilities

### Manufacturing Industry

- Tool and Die
- Fabricators
- Mold Extrusions
- Snack Food
- Packaging
- Aluminum Siding
- Glass and Glazing
- Industrial and Automotive Tools



# Selecting a CPA Firm

want the cache and price tag of a larger firm, then understand that you will be less significant to them. The largest firms have a bureaucracy that may not suit your style. Bigger isn't always better; for your finances or your diet.

## 2.) *Call in the Expert!*

Who would you prefer as your surgeon – the Doctor with years of experience or the one who has done “similar surgeries, but not this kind?” When looking for a CPA firm, industry experience counts big. Sure, there's a lot about the XX's and 00's in accounting that transfer from industry to industry, but there is nothing that will trump a CPA with industry experience who can go beyond the numbers. You need someone who speaks the lingo, understands industry nuances and can relate to your particular industry challenges.

## 3.) *Reputation Counts.*

When a firm does what it says it will do, it earns a good reputation

for integrity and professionalism. Reputations can't be bought; they have to be earned, and as a result, what your colleagues say about the firms you're considering is important. Even more important are the comments from current and past clients of a firm because first-hand knowledge trumps hearsay. When a CPA firm hits all cylinders of a client relationship, its reputation will spread and it will grow from referrals and goodwill. We don't know whether it's important to you or not, but here at RBF Co we think a good reputation goes beyond the firm itself to include the reputations of the Partners and team members. We look for a culture that is client centric and Partners who are active in the community and give back in many different ways. We believe that when you give your word, you keep it and you're only as good as keeping the promises you make.

## 4.) *Certiably Qualified*

It's easy to assess the basic qualifications and certifications of each Partner and team member when you're evaluating a CPA firm. But we urge you to dig deeper. Not every firm offering “accounting services” may be fully qualified. Obviously you'll want a Certified Public Accounting firm; but also look for firms that are involved in the industry through the American Institute of Certified Public Accountants and the

### JEFF BLEACHER



*“We have built a firm and a culture that is customer-centric. As we grow and expand our expertise in multiple industries we continue to stay cognizant of what matters most to our clients. That is to be responsive, proactive, accurate and take care of their needs perhaps even before they know what they need. We work to go beyond the numbers and to have long-term relationships with clients that help us all work toward the same goal of company growth and sustainability. It's not only the numbers that we love about accounting. It's the people.”*

### KEN FALK



*“Some people think that accountants are “stuffed shirts” but anyone who knows me and the firm know that we are people oriented first and foremost. We love to do great accounting work but, even more so, we love to see companies succeed and grow. Our greatest achievement is not the perfect tax return or audit, but it's how we help people to make their businesses better. Not just for this year but for generations to come.”*

*“Legacy accounting:  
Will you have been an asset  
or a liability on the world's  
balance sheet?”*

*- Ryan Lilly*



# Selecting a CPA Firm

Pennsylvania Institute of Certified Public Accountants (PICPA). Firms must maintain their credentials on an annual basis through Continuing Professional Education (CPE). But firms that really care about their credentials will do more than the minimal requirements. Look for a firm that has a culture of learning and one that encourages all of its team members to continue their education in the accounting industry and stay current with technology.



## 5.) Go Beyond the Numbers

Every CPA can run the numbers for your business. But the work of an accountant is much more. Ultimately, the most successful accountants have one thing in common: their stellar interpersonal skills. When searching for the perfect fit for your business, look for evidence that the CPA firm's team has the ability to work well with your team. Check references to see if their team produced consistent results, that they took ownership of their performance and that their communication skills and response time was better than just acceptable.

Finding a compatible CPA firm will take some time and effort on your part, but will be worth it in the long run if you follow a rigorous selection process. Working with a CPA firm that's a good fit for you can make the difference between success and mediocrity.

### JEFF GROFF



*"Accounting fits my personality perfectly and I love the challenge of accounting. But, that's not why I'm at RBF. I'm here for my clients, for the firm's growth and for helping people who need the professional expertise that we bring to them. When clients bring us their greatest challenges is when we shine. We are able to get beyond the small matters to see the big picture and help to solve complex problems. That's why clients love RBF."*

### PATRICK GENDRUE



*"RBF is one of Lancaster's best CPA firms serving the SouthCentral PA region. We are different in many ways. Our clients tell us they appreciate having access to the Partners, our quick response time and our personal relationships. We add value to the accounting process by going beyond accounting practices to helping clients in their business strategies and in their operations. We all love accounting here, but we have a higher purpose and that is to serve our clients in the best ways possible."*

**Disclaimer of Liability:** Our firm provides this information for general guidance only, and does not constitute the provision of legal advice, tax advice, accounting services, investment advice, or professional consulting of any kind. The information provided herein should not be used as a substitute for consultation with professional tax, accounting, legal, or other competent advisers. Before making any decision or taking any action, you should consult a professional adviser who has been provided with all pertinent facts relevant to your particular situation. Tax articles are not intended to be used, and cannot be used by any taxpayer, for the purpose of avoiding accuracy-related penalties that may be imposed on the taxpayer. The information is provided "as is," with no assurance or guarantee of completeness, accuracy, or timeliness of the information, and without warranty of any kind, express or implied, including but not limited to warranties of performance, merchantability, and fitness for a particular purpose.

Ross Buehler Falk & Company, LLP  
Certified Public Accountants

1500 Lititz Pike  
Lancaster, PA 17601

717-393-2700  
717-393-1743 (fax)

[www.rbfc.com](http://www.rbfc.com)

RBF is a Lancaster, PA CPA and consulting firm specializing in providing accounting and consulting services with the highest integrity.

