

I Want to Switch Accountants... Now What?

What You Need To Do Now

- **Decide what's not working.** Is it lack of communication, slow turnaround times, poor advice, or just a gut feeling? Knowing why you want to switch helps you find the right fit going forward.
- **Choose your new accountant.** Look for someone who understands your business, communicates clearly, and offers the services you need. You should feel comfortable asking questions and confident in the answers.
- **Let your new accountant handle the switch.** Good news - most of the admin sits with us. I'll contact your previous accountant, request a handover, and get everything we need to take over smoothly and professionally.
- **Check your contract.** Look for any notice period, outstanding fees, or restrictions with your current accountant. These are usually straightforward but worth checking.
- **Have your records ready.** Your new accountant will need things like your last set of accounts, tax returns, payroll records and access to accounting software. If anything's missing, don't worry - we'll help chase it.

How I Can Help

I can:

- Review your current setup and spot any issues
- Handle the entire handover with your old accountant
- Check that everything has been done correctly so far
- Get you set up with systems that suit your business
- Give clear, practical advice in plain English

Easy Mistakes to Avoid

- ✗ Putting off the switch because it feels awkward
- ✗ Thinking you're stuck with an accountant who isn't working for you
- ✗ Switching during a major deadline without support
- ✗ Not understanding what your new accountant will need
- ✗ Forgetting to cancel direct debits or software access

Need a hand?

Changing accountants is more common than you think - and easier than it sounds. If you're ready for better support, I'm ready to help.