CV Bookkeeping
Corrie Verheijen

FREE GUIDE FOR SMALL BUSINESS OWNERS

Choosing a bookkeeper: *questions to ask*

Handing over your books is a big decision, and it's okay to ask lots of questions. Use this guide on any discovery call, with us or with another bookkeeper. Switching? Page 2 covers the handover.

Credentials and experience with your kind of business

- *What training or designations do you have?*
  Good answer: a designation such as CPB (Certified Professional Bookkeeper) or relevant training, explained plainly. Bookkeeping isn't regulated in Canada, so it's a fair question.
- *Have you worked with businesses like mine?*
  Good answer: real examples (a group practice, a studio with memberships and drop-ins) and the quirks they already know.

What's included and how pricing works

- *What's included, and what costs extra?*
  Good answer: a written list (reconciliations, sales tax (GST/HST, PST, or RST) filings, reports, payroll, year-end) with add-ons named up front.
- *A set monthly price, or hourly?*
  Good answer: either can work. A set price means you know the cost ahead of time and can ask questions without watching the clock; hourly can suit one-time jobs. Either way, they explain what would change your price.

Software and sharing documents securely

- *Which software, and who owns the subscription?*
  Good answer: QuickBooks Online, Xero or similar, with owner-level access for you.
- *How do I send receipts and statements?*
  Good answer: a secure portal or shared folder, not plain email.

Communication and response times

- *How do we stay in touch, and how soon do you usually reply?*
  Good answer: one clear channel and a realistic timeframe.
- *How often will I see reports?*
  Good answer: a set rhythm, with time for your questions.

Who actually does the work

- *Who works on my file, and who reviews it?*
  Good answer: names or roles, and whether anything is outsourced.

Year-end and your accountant

- *What do you give my accountant at year-end?*
  Good answer: reconciled accounts, reports and a short list of open items, and they're happy to talk with your accountant.

If you ever leave, who owns your data?

- *What happens if I leave?*
  Good answer: your books and documents are yours, the notice period is in writing, and they help with the handover.

Gentle red flags

- Pricing stays vague, even after you ask.
- They want your CRA or online banking passwords instead of their own access.
- The accounting file is only in their name.
- There's no written agreement.
- They promise a certain tax result or refund.
- You come away feeling judged about the state of your books.

MY NOTES

Rather have someone take care of the switch?

Book a free 30-minute consult at cvbookkeeping.ca/consult/

cvbookkeeping.ca

PAGE 2 · SWITCHING BOOKKEEPERS

Your *switching* checklist

Before you switch

- [ ] Check your current agreement for the notice period and any final fees.
- [ ] Pick a cut-off date (a month-end is easiest) so everyone knows who handles what.

Gather and hand over

- [ ] **Accounting file access:** confirm you have the owner login.
- [ ] **Bank and credit card statements** from the last reconciled date forward, plus loan statements.
- [ ] **Last reconciled date** for each account, with reconciliation reports if you have them.
- [ ] **Payroll:** your provider, payroll account number, remitting schedule and employee list.
- [ ] **Sales tax (GST/HST, PST, or RST):** account numbers, filing frequency, last period filed and any balance owing.
- [ ] **Open questions:** uncategorized transactions, unpaid bills and any CRA letters.
- [ ] **Other logins:** payment processors and booking software (a user for each person, no shared passwords).
- [ ] **Year-end:** your accountant's contact details, last year's financial statements, the **trial balance**, and the **adjusting journal entries** your accountant made. Without those entries your books won't match the return that was filed.
- [ ] **Company papers:** your **articles of incorporation** if you're incorporated, and your **last tax filing** (a T2 for a corporation, or your T1 with the T2125 if you're a sole proprietor).

Update who has access

- [ ] **CRA, remove your old bookkeeper:** in My Business Account, or call CRA at 1-800-959-5525.
- [ ] **CRA, add your new bookkeeper:** in My Business Account, once they give you their representative number.
- [ ] **QuickBooks Online, remove your old bookkeeper:** take their accountant user off in Manage users, on the Accounting Firms tab.
- [ ] **QuickBooks Online, add your new bookkeeper:** invite them as your accountant from the same tab.

Your new bookkeeper sends you instructions for each step. It takes a few minutes.

What a bookkeeper gives you back

- **Your evenings.** Data entry, chasing, and filing, off your plate.
- **Numbers early enough to use.** Knowing in February beats finding out in June.
- **No surprise deadlines.** Sales tax, payroll, and year-end, tracked for you.
- **A smaller accounting bill.** Tidy books take your accountant less time.
- **Someone to ask first.** Before you hire, buy, or take money out.

If the one you leave is us

Good things come to an end, and businesses change. Nobody here takes it personally. Tell us early and be open with us, and we'll work through this list together, so your new bookkeeper starts with everything they need.

Corrie's take: Most of a switch is really just logins and statements. I always pick the cut-off date first, because it makes every other step easier to plan.

General information, current as of September 2026. Not tax or legal advice. CRA steps are from canada.ca (Authorize a representative); check with CRA or your accountant about your situation.

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