**Thinking of changing Accountant?**

Most people believe that changing accountants will be difficult, time consuming and fraught with problems – which is why many people suffer bad service in silence.

Breaking up is hard to do – after years of dealing with someone, you know how they work and you don’t want to have “that” conversation to end things.

Carbon Accountancy can help you make that change - we aim to provide the highest level of client service, always welcome client feedback on how we can improve and genuinely care about you and your business. We even have a guarantee – see below.

[Click here to see Testimonials and Case Studies](http://www.carbonaccountancy.co.uk/results/) from just some of our many happy clients, some of whom have themselves moved to us from other accountants to get a better service. Or we’d be happy to put you in direct contact by telephone.

If you’re thinking of changing accountants see our tips and hints below.

**Why change accountants?**

All businesses need a good Accountant (internal and external) – because a good accountant can help your business as it grows. All businesses evolve and it may be that your Accountant is no longer right for you or it could be that you’re unhappy with the client service you’re getting.

The accountants who can tell you what happened in your business fifteen months ago but can’t help you with a cashflow forecast for the next fifteen weeks might well be next to useless to you.

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| --- | --- |
| **Perceptions and Problems** | **Reality and Solutions** |
|  |  |
| I don’t want to tell my accountant I am leaving – even though I am not happy. | Your accountant is grown up and will have had this conversation with clients before.  We even have a template letter you can use. ***See the end of this article to use it.*** |
|  |  |
| All accountants provide the same level of service so there is no point in changing. | That’s not true – service levels will differ between firms based partly on cost (you do get what you pay for).  However, service levels also differ between firms based on their culture – if the firm is focused solely on short term fee income and profits then service may suffer.  Our culture is a caring one – we care about our clients, our staff and our reputation above short term financial goals – we still have financial goals but they are balanced with delivering excellent client service. |
|  |  |
| Information will be lost in the hand over. | This very rarely happens – there is a proper hand over of information between professional accountants – it is part of our Industry Standards. |
|  |  |
| The new accountant will not understand my business and I will end up paying more tax. | We will invest sufficient time upfront to understand your needs and your business. |
|  |  |
| I will incur costs in moving Accountants | The vast majority of accountants do not charge for moving – either in or out.  A few accountants will see it as an opportunity to bill you for all the free extras – a few meetings or phone calls you may have had that you thought were included in the fee. We recommend that before you inform your old Accountant that you are moving, you email them and ask them if your account is up to date – that way they should not charge you for “extras”! |

**Our guarantee**

As a client service based business we aim to provide the highest level of client service. We know you’ve heard that one before but we genuinely care.

As in any service based business, we do not guarantee to be perfect – things can and occasionally do go wrong. Minor things that annoy rather than life threatening issues – but they do annoy, which is why we have some guarantees in place.

We guarantee that we will listen to you – and try to ask for your feedback proactively at appropriate times.

We guarantee that our charges are fixed rate – you will only be billed for what was agreed. We will inform you if something is outside the scope of our Engagement Letter (most things are included by the way) and we will always agree a fixed fee for additional work before you are liable for a penny (even if we have already started the work). We value the long term client relationship – the vast majority of our new business comes from client referrals and we know that by ensuring you are happy we will maximise our client referral rate.

We guarantee that if our fixed fee quote was too high because we over estimated the work involved, we will inform you and reduce the fee – it has happened on a few occasions!

We guarantee that if something does go wrong we will try to resolve the matter for you – if it is our fault it will be resolved at no charge, obviously (it may sound obvious but you would be surprised what can happen to people in relation to this). If it was not our fault then we are likely to resolve it for you free of charge in any event (there are rare exceptions to this).

We guarantee that if we are responsible for you incurring a fine, we will pay it – it has happened (thankfully it’s rare) but when it has we have tried to pay the fine before the client was even aware of it.

**Private & confidential**

[Partner name]

[Firm name]

[Firm address]

[Date]

Dear [Partner name]

**Change of Accountants**

I am writing to you to inform you that I have decided to move accountants to Carbon Accountancy Limited.

John Leyden from Carbon Accountancy Limited, Chartered Accountants, 80-83 Long Lane, London EC1A 9ET will be in touch with you shortly to arrange the hand over. I would be grateful if you could provide him with your assistance in the transition.

I realise that most businesses like to understand the reason for clients leaving.

**[Choose from:]**

I have had a number of issues with client service in recent times and feel it is in both our interests for me to move accountants.

I have had to consider the cost base of the business carefully and have been offered a competitive quote which I have decided to proceed with.

I have had no client service issues to concern me but as you are aware the business has evolved substantially and I feel that my new accountants will be better placed to serve the future needs of the business.

I would like to take this opportunity to thank you and your staff for your attention over the years and I wish you well in the future.

Kind regards.

Yours sincerely

**[name]**