Libman Tax Strategies

Southern California S Corp Owner: The 7 Red Flags It's Time to Switch Accountants

Find out if your accountant is creating more problems than they solve without waiting until tax season to realize something isn't working.

INSTRUCTIONS

Go through the seven red flags below and mark each one:

- **YES** — This happens with my accountant.
- **SOMETIMES** — It happens often enough to frustrate me.
- **NO** — This isn't a problem.

This isn't about expecting your accountant to be available every second of the day.
It's about answering a simpler question: **Does your current accounting relationship actually give you confidence that your taxes and bookkeeping are being handled?**

When you're finished, count how many red flags you marked **YES** or **SOMETIMES.**

1. You Have to Follow Up Just to Get a Response

☐ Yes
☐ Sometimes
☐ No

You send an email. Then another. Maybe you leave a voicemail. Eventually, you're spending your own time trying to get a basic question answered.

Your accountant doesn't need to respond instantly. But you also shouldn't feel like getting a response has become **your responsibility.**

Ask Yourself:
Am I spending too much time chasing the person I hired to help me?

2. You Never Really Know Where Things Stand

☐ Yes
☐ Sometimes
☐ No

You've submitted documents. You've answered questions. But you're still wondering:

- Did they get everything?
- Is anything missing?
- Has anyone started working on this?
- Is there something I need to do?
- Are we actually ready to file?

If you constantly have to ask for status updates, the relationship itself starts creating unnecessary stress.

Ask Yourself:
Do I feel informed—or am I usually guessing?

3. You Only Hear From Them When Something Is Urgent

☐ Yes
☐ Sometimes
☐ No

Maybe everything stays quiet for months. Then suddenly:

- You need to send documents.
- A payment needs attention.
- Tax season is here.
- Something needs to happen now.

That reactive cycle can leave you wondering why you're only learning about things once they've already become urgent.

Ask Yourself:
Do I usually know what's coming—or do things keep becoming last-minute problems?

4. Tax Season Always Turns Into a Scramble

☐ Yes
☐ Sometimes
☐ No

Every year feels the same:

- Looking for missing documents
- Cleaning up bookkeeping
- Answering last-minute questions
- Trying to remember transactions from months ago
- Wondering if everything is actually ready

Some tax-season work is unavoidable.
But if filing your S Corp return consistently feels like rebuilding the entire year, something in the process probably isn't working well.

Ask Yourself:
Does tax season feel organized—or like another fire drill?

5. Your Books Exist, But You Don't Trust Them

☐ Yes
☐ Sometimes
☐ No

Maybe you use QuickBooks. Maybe you already have a bookkeeper. But you still wonder:

- Are all the accounts reconciled?
- Are transactions categorized correctly?
- Is anything missing?
- Are the numbers actually current?
- Will something have to be fixed before filing?

Having bookkeeping software isn't the same as having confidence in your books.

Ask Yourself:
If my tax return had to be prepared today, would I trust the numbers behind it?

6. You Keep Getting Passed From Person to Person

☐ Yes
☐ Sometimes
☐ No

You explain your situation to one person. Then somebody else emails you. Then another person asks a question you thought you already answered.

Soon, you're wondering whether anyone actually understands the full picture.

The problem isn't having a team. The problem is feeling **like you're the only person responsible for keeping everyone on the same page.**

Ask Yourself:
Do I know who actually understands and is responsible for my situation?

7. You've Lost Confidence in the Relationship

☐ Yes
☐ Sometimes
☐ No

This is the biggest red flag. Maybe there hasn't been one catastrophic mistake.

- You just don't feel good about the relationship anymore.
- You hesitate before asking questions.
- You wonder whether you're getting enough attention.
- You aren't sure whether things are being handled until you check yourself.

At some point, the issue stops being one unanswered email. It becomes **trust**.

Ask Yourself:
Do I feel confident that my taxes and bookkeeping are in good hands?

Your Results

Count every answer you marked **YES** or **SOMETIMES**.

0–1 Red Flags

Your current relationship may be working reasonably well.

No accountant relationship is perfect, and an occasional communication issue doesn't necessarily mean you need to make a change.

2–3 Red Flags

There are enough frustrations here to pay attention.

Look at which problems keep repeating and ask yourself whether they're isolated annoyances—or signs that your business has outgrown the way your taxes and bookkeeping are currently being handled.

4+ Red Flags

You may not simply have a communication problem. You may have an **accounting relationship problem**.

If you regularly have to chase answers, wonder where things stand, scramble at tax time, and double-check whether things are being handled, it may be worth seeing what working with someone else could look like.

WHY THIS IS IMPORTANT

Your accountant is supposed to help remove uncertainty from your business. They shouldn't become another person you have to manage. For an S Corp owner, taxes and bookkeeping already come with enough moving pieces. The relationship should give you more confidence—not create another layer of questions like:

- **Did they get my email?**
- **Is somebody working on this?**
- **Do they need anything from me?**
- **Am I going to find out about something at the last minute?**

The real question isn't: **"Is my accountant perfect?"** It's: **"Do I trust the way my taxes and bookkeeping are being handled?"** If the answer is increasingly **no**, that's worth paying attention to.

Tired of Chasing Your Accountant?

Adam C. Libman, CRTP works directly with business owners on tax preparation and bookkeeping.

If your current accounting relationship is leaving you frustrated, uncertain, or constantly following up, you can have a straightforward conversation with Adam about what's happening and whether working together makes sense.

And when it comes to communication:
We return every call and email or your money back.

adamlibman.com/free-s-corp-tax-return-year-one

Talk With Adam