OUTSOURCED ACCOUNTING HANDOFF / 01

MAP THE RECURRING WORK

Name task categories and desired outcomes without entering transactions, balances, records or account details.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Task A / recurring work category / no financial detail

Business purpose or decision supported / neutral description

Record Category A / private source location reference only

Expected frequency or period label / no deadline conclusion

Requested output or completion signal / provider to define

Open inclusion, exclusion or dependency question

Preparation only. Not accounting, bookkeeping, tax, audit, assurance, controls, data-governance, financial, credential, provider-selection or legal advice. Keep figures, records, credentials and access details private.

OUTSOURCED ACCOUNTING HANDOFF / 02

ASSIGN OWNERS AND REVIEW POINTS

Separate preparation, processing, review, correction and approval so one word such as handled does not hide the handoffs.

Client Input Owner A / category and handoff point

Provider Task Owner A / proposal section

Review A / reviewer role / evidence label

Approval A / authorized role / boundary to confirm privately

Exception or correction owner / return path / revised-output label

Unresolved access, control or professional-judgment question

Preparation only. Not accounting, bookkeeping, tax, audit, assurance, controls, data-governance, financial, credential, provider-selection or legal advice. Keep figures, records, credentials and access details private.

OUTSOURCED ACCOUNTING HANDOFF / 03

CHECK THE PRIVATE-READY HANDOFF MAP

Tick what is organized. These checks do not validate records, controls, accounting methods or deliverables.

- [ ] Every task category has a neutral label
- [ ] Client and provider responsibilities are separated
- [ ] Review and final approval are separately identified
- [ ] Each handoff has a non-sensitive evidence label
- [ ] Exceptions and corrections have an owner and return path
- [ ] Recurring deliverables name a purpose and recipient role
- [ ] No figures, records, credentials or access details are included
- [ ] Professional judgments remain with qualified people

Missing owner, review evidence or correction path

Private systems or records discussion still required

Written scope or deliverable definition still missing

Preparation only. Not accounting, bookkeeping, tax, audit, assurance, controls, data-governance, financial, credential, provider-selection or legal advice. Keep figures, records, credentials and access details private.

OUTSOURCED ACCOUNTING HANDOFF / 04

QUESTIONS FOR THE ACCOUNTING PROVIDER

Ask every provider the same operating questions and record where each answer appears in the written proposal.

Scope: which task categories are included, optional, excluded or dependent?

Ownership: who prepares, processes, reviews, corrects and approves each handoff?

Evidence: what shows that work and review were completed?

Exceptions: how are missing inputs, questions and revised outputs tracked?

Deliverables: what recurring outputs, meetings and support boundaries are included?

Private review: what records, systems, access and professional decisions must be handled securely?

Preparation only. Not accounting, bookkeeping, tax, audit, assurance, controls, data-governance, financial, credential, provider-selection or legal advice. Keep figures, records, credentials and access details private.

OUTSOURCED ACCOUNTING HANDOFF / 05

COMPARE THE SAME OPERATING MODEL

Use Provider A and Provider B with the same neutral task map. Compare written responsibility and follow-through, not unsupported promises.

Provider A / Provider B / proposal dates / same task map

Included tasks, dependencies, exclusions and owner clarity - A / B

Review evidence, correction paths and approval boundaries - A / B

Recurring deliverables, meetings, support, changes and open questions - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start a CPA & Accounting request. Share a non-sensitive responsibility, review and deliverable brief so participating pros can compete with proposals. Compare task ownership, review points, correction paths, recurring outputs, support boundaries, timing and fit. A private consultation and secure records-and-systems review may be required before final scope.

One request. Every pro's best offer.

Start a request

Participation varies. A private consultation and secure records-and-systems review may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/accounting/outsourced-accounting

IRS: Recordkeeping (official reference)

U.S. Small Business Administration: Manage Your Business (official reference)

Preparation only. Not accounting, bookkeeping, tax, audit, assurance, controls, data-governance, financial, credential, provider-selection or legal advice. Keep figures, records, credentials and access details private.