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CPA Firm Selection Worksheet

Feature: _____ **Loomis & Co. CPAs** _____ **Other Firm #1** _____ **Other Firm #2** _____

Clients

1. Work directly with CFOs and controllers in first year?	Yes
2. Work directly with owners of client companies in first year?	Yes
3. Largest client industry percentage of total fees?	38% (Construction)
4. Largest client's percentage of total fees?	< 10%
5. Percentage of fees from write-up work?	< 5%
6. National and international resources?	Yes

People

1. Small, fun atmosphere?	Yes, 12 people
2. Bureaucracy?	Negligible
3. Social events throughout year?	Yes
4. Number of formal counseling meetings per year?	Two +
5. Goal setting each year?	Yes
6. Heavy communication emphasis?	Yes

Self-Directed Opportunity

1. Business or individual tax oriented firm?	Business
2. Percentage of firm's total fees from business (not individual income tax returns)?	> 90%
3. Grow at your own pace?	Yes
4. Growth not limited by other people and politics?	Yes
5. Able to see all areas of a financial statement engagement in the first year?	Yes
6. Able to see directly how audit, tax, and consulting services are performed for a client?	Yes
7. Work directly with seniors, managers, and partners in first year?	Yes
8. Exposed to other parts of CPA firm in first year (training, marketing, etc.)?	Yes
9. Help with building professional network in first year?	Yes



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Continuous Learning

1. Number of hours of training per year (requirement = 40 hours)?	80 - 120
2. A majority of classes are live (versus web casts and self-study)?	Yes
3. Training individualized to your wants and needs?	Yes
4. Soft skills training (leadership, networking, client service, etc.) every year?	Yes
5. Opportunity to present in-house training sessions in first year?	Yes
6. Out of town training in first year?	Yes
7. Reimbursement for masters classes beneficial to firm?	Yes

Benefits*

1. CPA Exam cost reimbursement, including registration, review courses, exam fees?	Yes
2. CPA Exam bonus?	Yes, up to \$2,500
3. CPA Exam program (help with registration, scheduling, studying options)?	Yes
4. Medical insurance? Employer paid portion: employee/family	Yes, 80%/80%
5. Dental insurance? Employer paid portion: employee/family	Yes, 80%/80%
6. Disability insurance? Employer paid portion	Yes, 100%
7. Section 125 cafeteria plan, including flexible medical, dependent care, premiums?	Yes
8. 401(k) profit sharing plan? Current amount contributed by firm to eligible employees?	Yes, 5%
9. Performance based bonuses from year one?	Yes
10. Overtime paid for CPA candidates?	Yes
11. Paid vacation?	2 weeks minimum
12. Paid sick time?	6 days
13. Practice development success fee?	Yes, 10%
14. Bereavement time off?	Yes
15. Laptops for all CPAs?	Yes
16. Cell phone reimbursement for all CPAs?	Yes
17. Professional fees paid by firm (CalCPA, AICPA)?	Yes
18. Community involvement encouraged by firm?	Yes
19. Professional association involvement encouraged by firm?	Yes
20. Individual work space?	Yes

* Summary only. See the Loomis & Co. CPAs, LLP Employee Manual for governing details.