

PROFESSIONAL ASSISTANCE CHECKLIST

- Financial planner:
 - Partner in the firm.
 - Face-to-face access when needed.
 - Experienced with self-employed and entrepreneurial.
 - Does not sell anything other than advice.
 - Certified financial planner (CFP) or equivalent certification.
- Tax professional:¹
 - Certified public accountant (CPA).
 - Partner in the firm.
 - Face-to-face access when needed
 - Experienced with self-employed and entrepreneurial.
 - Does not sell anything other than advice.
 - Proactively suggests tax-savings ideas.
- Bookkeeper:
 - Master's or equivalent in accounting.
 - Provides computerized spreadsheets, balances, ledgers.
 - Willing to deal directly with tax professional as needed.
- Attorney:
 - Understands solo practices and professional services providers.
 - Can provide trademark and other protection assistance.
 - Partner in the firm.
 - Can provide litigation assistance (e.g., plagiarism claims).
- Web designer:
 - Excellent sites created that can serve as references.
 - Can register and perpetuate domain names and ownership.

¹This person may or may not be your financial planner.

- Can take care of maximum search engine exposure (“meta-tags,” etc.).
- Accessible by phone within a business day.
- Does all web site work, navigation, and links, but *not* copy (that’s your job).
- Graphics designer:²
 - Evidence of superb work.
 - Can guarantee reasonable delivery/response times.
 - Always will provide options from which you can choose.
- Printer:
 - Maintains extensive hours of operation.
 - Can provide duplication while you wait.
 - Can provide color copies and color printing.
 - Can accept work and provide work electronically.
 - Can bind, provide covers, collate, provide inserts, and so on.
- Travel agent:
 - Extensive hours.
 - Finds the best deals.
 - Available to change plans and reservations during a trip.
 - Inserts and tracks frequent-flier credits.
 - Reasonable fees.

²This is the individual who creates your brochures, publicity pieces, product covers, and the like.