

## **Interview Questions to Use When Engaging a Person or Firm to Provide Financial Services**

- Tell me about you (or your firms) previous experience providing financial services to nonprofit organizations?
- What are some of the greatest problems in budgeting and financial management for a nonprofit organization such as ours?
- What suggestions do you make to address these issues?
- What information does an Executive Director need to manage an organization's finances?
- What information does a Board of Directors need to fulfill its fiduciary requirements?
- If our Center suddenly learned income will be 20 percent less than anticipated, what steps would you take, in what order, to resolve the problem?
- How do you typically distribute financial work between an on-site staff person and you (or your firm)? What work do you complete? The staff person?
- Who will actually do the work on site? You? Someone else?
- Who are your other nonprofit clients?
- What is your fee structure? What is the estimated cost?