



Should I Stick or Switch?

A DECISION GUIDE FOR RESTAURANT OWNERS



01

OWNERSHIP AND ACCOUNTABILITY

- Is it clear who is responsible for setting and owning your 2025 tax assumptions and elections?
 - Yes
 - No
 - Not sure
- When results diverge from plan, does your accountant create clarity for decisions for the remainder of the year?
 - Yes
 - No
 - Not sure
- Are tax and accounting decisions explained proactively, or simply delivered after the fact?
 - Yes
 - No
 - Not sure
- Do you feel confident that your accountant is acting as a partner—not just a filer?
 - Yes
 - No
 - Not sure

If ownership feels unclear now, it rarely becomes clearer later

02

BUSINESS COMPLEXITY MANAGEMENT

- As your business has changed over the last 12–24 months, has your accountant proactively adjusted scope, structure, or planning approach?
 - Yes
 - No
 - Not sure
- When reporting obligations exist (investors, partners, lenders), does your accountant actively support and guide that reporting?
 - Yes
 - No
 - Not sure
- Are payroll, depreciation, and occupancy costs reviewed strategically by your accountant — rather than simply carried forward from prior years?
 - Yes
 - No
 - Not sure

Complexity doesn't require perfection—but it does require intention

03

STRATEGIC TAX OWNERSHIP

- When you plan capital investments (builds, remodels, or major purchases), are tax implications discussed *before* timing and scope are finalized?
 - Yes
 - No
 - Not sure
- When capital improvements are made, does your accountant guide how and *when* costs should be treated to optimize cash flow and tax outcomes?
 - Yes
 - No
 - Not sure
- Are payroll and tip structures reviewed and adjusted as the business evolves rather than carried forward annually?
 - Yes
 - No
 - Not sure
- Are tax credits and incentives identified throughout the year, or only applied if they're obvious at filing?
 - Yes
 - No
 - Not sure

Your financial strategy should be as alive and dynamic as your restaurant

04 GROWTH AND REAL ESTATE

- Can you clearly see performance by location or concept?
 - Yes
 - No
 - Not sure
- Do you have clarity on lease terms, occupancy costs, and real estate exposure?
 - Yes
 - No
 - Not sure
- Does your accountant help you model “what’s next”—or just report what already happened?
 - Yes
 - No
 - Not sure

Clean narratives start with clear ownership

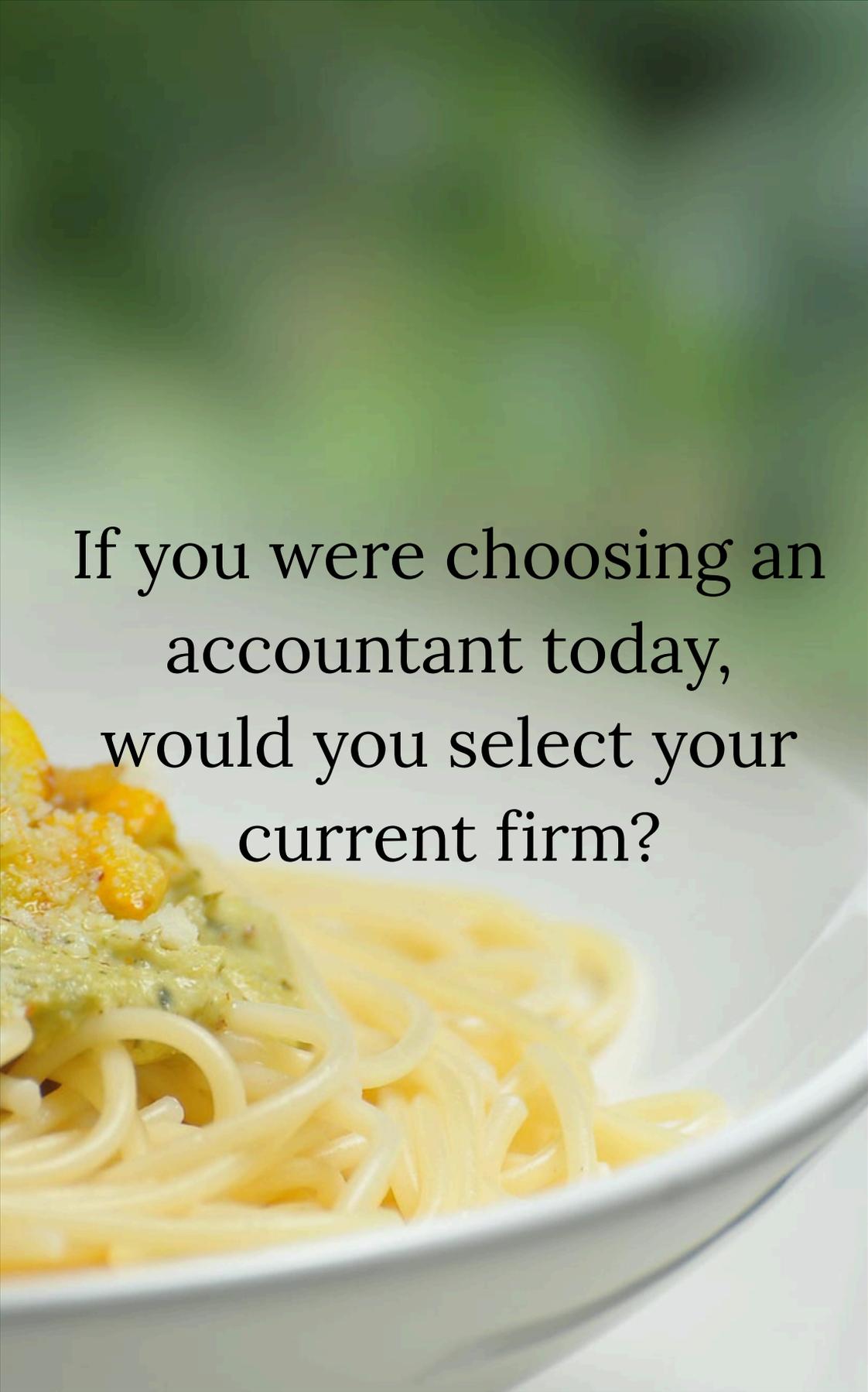
05

INVESTOR AND

GOVERNANCE SUPPORT

- Are your financial reports investor- or lender-ready without heavy explanation?
 - Yes
 - No
 - Not sure
- Are your financials prepared using consistent methods year over year — with changes clearly explained— so the numbers can be trusted?
 - Yes
 - No
 - Not sure
- Is there one clear source of truth for your financials— rather than multiple versions used for different purposes?
 - Yes
 - No
 - Not sure

If accounting is always downstream of decisions,
it's not functioning as a control system



If you were choosing an
accountant today,
would you select your
current firm?

HOW TO INTERPRET YOUR ANSWERS



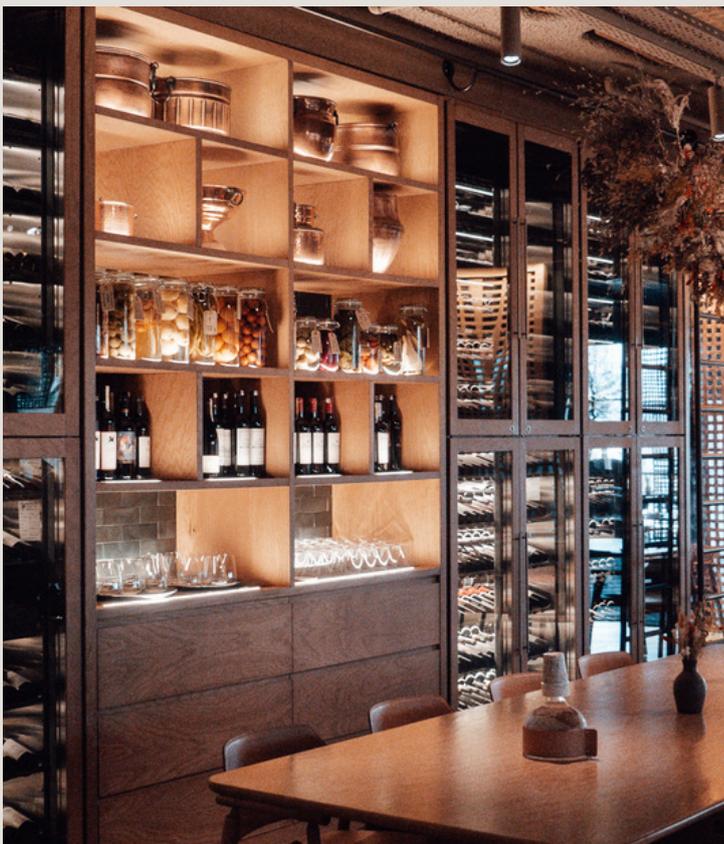
IF MOST ARE “YES”

Your current accounting setup appears to be actively supporting the business, not just maintaining it.

You've likely:

- Established clear ownership
- Avoided default decisions
- Built trust in your numbers

Great work!



IF MOST ARE “NO” OR “NOT SURE”

That's a strong signal that key decisions are being defaulted rather than managed.

In most cases, this leads to:

- Missed opportunities
- Delayed visibility into issues
- Harder, more expensive fixes later in the year



If you're on the lookout for a clean break, we can hand-pick top-tier restaurant accounting firms that specialize in your concept and growth goals.

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