

Guide to Hiring a CPA Firm

For McDonald's
Restaurant
Owner/Operators

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DOES THE CPA FIRM HAVE MCDONALD'S TRAINING AND EXPERIENCE?

Selecting and retaining a qualified CPA firm is one of the most important decisions an operator makes. You need a CPA firm that, in addition to providing important basic services, offers McDonald's specific services. Use this checklist to help decide if the CPA firm you're considering really has knowledge and experience in dealing with McDonald's business matters.

MINIMUM SERVICES

Financial statement preparation including Balance Sheets and P&Ls	
Detailed general ledgers	
Year-to-date comparative statements	
Timely SFS reporting to McDonald's	
Income tax planning	
Preparation of all federal and state, business and personal tax returns	
The firm and its principals/partners are registered and in good standing with their State Board of Accountancy	

RECURRING ACCOUNTING AND TRANSACTIONAL SERVICE

Back office and cash management	
Accounts payable processing	
Payroll processing	
Deposit verification	

FINANCIAL PERFORMANCE DIAGNOSIS

Access to comparison data	
Internal controls consulting for cash, sales, purchases and payroll	
Financial ratio and trend analysis	
Restaurant and entity valuations	
Strategic and Business Planning	
Rebuild/Relo/Reinvestment and Co-Investment analysis	
Analysis of new and existing restaurant purchase and sale of restaurant opportunities	
Business review preparation assistance	
Financing/Refinancing analysis	



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DOES THE CPA FIRM HAVE MCDONALD’S TRAINING AND EXPERIENCE?

Thousands of McDonald’s Owner/Operators have discovered that using a CPA firm that specializes in McDonald’s restaurants brings them a greater return on their investment. Does the firm you work with or are considering provide services to at least 100 McDonald’s restaurants? Does it offer these services? If you can’t answer “yes” to most of these items, you may be better served by another firm.

TAX CONSULTING + COMPLIANCE

Focus on industry specific tax law/changes	
Knowledge of tax minimization strategies and applicable tax credits	
Employee benefit plan design and consulting	
Entity selection analysis to minimize taxes	
Knowledge of tax treatment of McDonald’s specific items of income/expense/investment	
Knowledge of transfer tax minimization strategies available to McDonald’s franchisees	

RETIREMENT + SUCCESSION PLANNING

Estate and gift-planning and compliance	
Retirement and deferred compensation planning	
Personal and family financial planning	
Next generation planning	
Access to wealth management and investment advice	

TECHNOLOGY

Technology planning and implementation	
Computer software selection	
Knowledge of ISP, R2D2, and other System technology	
Utilizes technology to minimize paper and facilitate communication	
Ability to poll stores nightly to gather financial data	

SYSTEM INVOLVEMENT

Requires McDonald’s training for staff	
The CPA/staff attends McDonald’s specific training/CPA conference	
Satisfactory relationship with National Lenders	
Supports RMHC and System initiatives	

