



Minnesota Society of Certified Public Accountants
2021 - 2022 CPA Referral Service Registration Form

Contract year begins July 1, 2021 and runs through June 30, 2022

Listing eligibility

- CPA firm or sole proprietor with firm permit to practice public accounting in the state of Minnesota.
- Firm has at least one current MNCPA member.
- Firm maintains professional liability insurance of \$100,000 or greater.

How to enroll

- Complete this form and attach proof of professional liability insurance.
- Include payment of \$195 for each firm location you would like listed. Multiple office locations must be registered separately.

Firm name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Firm size (number of billable professionals): _____

Contact person: _____ Contact email: _____

Minnesota CPA Firm Permit #: _____

Person for MNCPA to contact if there are questions about this form: _____

Firm website: _____

Social media (include links for LinkedIn, Facebook, Twitter or Instagram, if desired):

Does anyone at your firm speak a foreign language? No Yes - which language? _____

Does your firm offer a free initial consultation? No Yes

Is your firm woman or minority owned? (at least 51% ownership)

No Yes - woman owned Yes - minority owned Yes - both

Indicate your firm's areas of specialization:

Individual services

- | | | |
|---|--|--|
| <input type="checkbox"/> Bankruptcy | <input type="checkbox"/> Eldercare | <input type="checkbox"/> Tax - individual |
| <input type="checkbox"/> Cryptocurrency | <input type="checkbox"/> Estate/trust | <input type="checkbox"/> Tax - international |
| <input type="checkbox"/> Divorce | <input type="checkbox"/> IRS representation/tax resolution | <input type="checkbox"/> Wealth management |
| | <input type="checkbox"/> Personal financial planning | |

Business services

- | | | |
|--|--|--|
| <input type="checkbox"/> Accounting services/bookkeeping | <input type="checkbox"/> E-commerce | <input type="checkbox"/> Sage |
| <input type="checkbox"/> Audit | <input type="checkbox"/> Employee benefit plans audit | <input type="checkbox"/> Sarbanes-Oxley auditing |
| <input type="checkbox"/> Audit - gov. auditing standards | <input type="checkbox"/> Employee benefit plans consulting | <input type="checkbox"/> Sarbanes-Oxley consulting |
| <input type="checkbox"/> Audit - single audit | <input type="checkbox"/> Forensic/fraud accounting | <input type="checkbox"/> Small business consulting |
| <input type="checkbox"/> Bankruptcy | <input type="checkbox"/> International accounting (IFRS) | <input type="checkbox"/> SOC engagements |
| <input type="checkbox"/> Business startups | <input type="checkbox"/> IRS representation/tax resolution | <input type="checkbox"/> SOC reporting |
| <input type="checkbox"/> Business succession planning | <input type="checkbox"/> Litigation support | <input type="checkbox"/> Tax - business |
| <input type="checkbox"/> Business valuations | <input type="checkbox"/> Mergers/acquisitions | <input type="checkbox"/> Tax - international |
| <input type="checkbox"/> Cash management | <input type="checkbox"/> Payroll | <input type="checkbox"/> Tax - multistate |
| <input type="checkbox"/> CFO services | <input type="checkbox"/> Projections/forecasts | <input type="checkbox"/> Tax - property |
| | <input type="checkbox"/> QuickBooks | <input type="checkbox"/> Tax - sales and use |
| | <input type="checkbox"/> Reviews/compilations | <input type="checkbox"/> Technology consulting |

No changes since previous year. Leave my listing as-is.

Indicate your firm's industry experience:

- | | | |
|---|--|--|
| <input type="checkbox"/> Advertising | <input type="checkbox"/> Franchisors | <input type="checkbox"/> Oil & gas |
| <input type="checkbox"/> Agriculture | <input type="checkbox"/> Gambling | <input type="checkbox"/> Printing |
| <input type="checkbox"/> Airlines | <input type="checkbox"/> Governmental | <input type="checkbox"/> Professional services |
| <input type="checkbox"/> Arts/entertainment | <input type="checkbox"/> Health care | <input type="checkbox"/> Real estate |
| <input type="checkbox"/> Auto dealerships | <input type="checkbox"/> Homeowners associations | <input type="checkbox"/> Religious organizations |
| <input type="checkbox"/> Cannabis | <input type="checkbox"/> Hotels/resorts | <input type="checkbox"/> Restaurants |
| <input type="checkbox"/> Child/day care | <input type="checkbox"/> HUD | <input type="checkbox"/> Retail |
| <input type="checkbox"/> Construction | <input type="checkbox"/> Information technology | <input type="checkbox"/> Self-employed |
| <input type="checkbox"/> Engineering | <input type="checkbox"/> Insurance | <input type="checkbox"/> Service |
| <input type="checkbox"/> Financial institutions | <input type="checkbox"/> Law firms | <input type="checkbox"/> Trucking |
| <input type="checkbox"/> Food & beverage | <input type="checkbox"/> Manufacturing | <input type="checkbox"/> Utilities |
| <input type="checkbox"/> Franchisees | <input type="checkbox"/> Nonprofit | <input type="checkbox"/> Wholesale |

No changes since previous year. Leave my listing as-is.

Suggestions for other specialties or industries to be included: _____

Please provide marketing copy for the MNCPA website (100 words or less).
If preferred, please attach a separate piece of paper or email copy to tmcdonald@mncpa.org.

PAYMENT INFORMATION

Referral Service firm		\$195
*Each additional firm location	\$195 x _____	\$ _____
	Total Due	\$ _____

- Check (payable to Minnesota Society of CPAs) or
 Personal card Firm card
 American Express Discover MasterCard Visa

Card number: _____ Exp date: ____ / ____ CVV: _____

Signature: _____ Date: _____

(If submitting payment by credit card, please mail or fax in your form. Emailing credit card data is a security risk.)

*One location per listing. Fees for each office location are required. Additional location addresses:

Send this form, along with all items listed under "How to Enroll" to:
MNCPA CPA Referral Service
1650 W 82nd St Ste 600
Bloomington, MN 55431

Questions? Contact Tabitha McDonald at 952-885-5522, tmcdonald@mncpa.org, or fax 888-487-9931.