



(065) Licensed Certified Public Accountant Application Checklist

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General Information

Instructions:

1. Before completing the application package, read each step. This will aid you in accurately completing your application and eliminate any delay in processing.
2. Applicants may apply to become a Certified Public Accountant via the Acceptance of Examination method or the Endorsement Method of Licensure.
 - *Acceptance of Examination:* Applicant has taken a National Exam, referred to by Illinois statute, in any state. Applicant is generally not licensed in another state.
 - *Endorsement:* Original license issued in another state and that state's requirements were substantially equivalent to Illinois requirements at time license was issued.
3. Disclosure of your U.S. social security number, if you have one, is mandatory, in accordance with 5 Illinois Compiled Statutes 100/10-65 to obtain a license. The social security number may be provided to the Illinois Department of Public Aid to identify persons who are more than 30 days delinquent in complying with a child support order, or to the Illinois Department of Revenue to identify persons who have failed to file a tax return, pay tax, penalty or interest shown in a filed return, or to pay any final assessment or tax penalty or interest, as required by any Tax Act administered by the Illinois Department of Revenue, or to other entities for verification of identification.
4. Applicants have three (3) years from the date of application to complete application process. If the process has not been completed in three (3) years, the applicant is denied, the fee is forfeited, and the applicant must reapply and meet the requirements in effect at the time of reapplication.
5. The Licensed Certified Public Accountant application fee is \$120.00 and is non-refundable.

Qualifications/Exemptions:

Certified Public Accountant

- If your CPA certificate was issued more than 4 years prior to applying for licensure, you must complete the Public Accounting CPE reporting form (PA-RF) listing a minimum of 90 hours of the verifiable category of CPE obtained within 3 years immediately preceding the application for licensure.
- Applicants will have to provide any records of previous licensure, both in related and non-related fields, and a Record of Examination.

- A CPA license is not required for the following activities:
 - Keeping books
 - Making trial balance or statements
 - Making audits, preparing reports, provided that the person does not indicate or in any manner imply that the trial balances, statements, or reports have been prepared or examined by a certified public accountant or a licensed certified public accountant or that they represent the independent opinion of a certified public accountant or a licensed certified public accountant
 - Preparing tax and information returns
 - Acting as representative or agent at tax inquiries, examinations, or proceedings
 - Preparing and installing accounting systems
 - Reviewing accounts and accounting methods for the purpose of determining the efficiency of accounting methods or appliances; and/or studying matters or organization, provided that the person does not indicate or in any manner imply that the reports have been prepared by, or that the representation or accounting work has been performed by a certified public accountant or a licensed certified public accountant.
- A CPA certificate from the Illinois Board of Examiners shall not authorize the holder to practice public accounting as defined in Section 8 of the Illinois Public Accounting Act.
- A CPA certificate from the Illinois Board of Examiners shall not authorize the holder to hold themselves out to the public as a certified public accountant in Illinois by using the title “certified public accountant” or the abbreviation “CPA” or any words or letters to indicate that the person using the same is a certified public accountant.

Application Requirements

Application Method	Requirements
<p style="text-align: center;">Acceptance of Examination</p>	<ol style="list-style-type: none"> 1. Completed online application including all required information <ul style="list-style-type: none"> • Date and Place of Birth • Name Change Information • Temporary Military Permit • Education Information • Social Security Number or an SSN Affidavit 2. Applicant must have received a certificate as a Certified Public Accountant from the Illinois Board of Examiners; a similar certificate from another jurisdiction with equivalent requirements, or registration as a certified public accountant with the Division of Professional Regulation. 3. Record of Licensure: list all other related or non-related professional licenses held in Illinois or another state(s). 4. Applicants must have completed at least one (1) year of full-time experience, or its equivalent, providing any type of service or advice involving the use of accounting, attest, management advisory, financial advisory, tax, or consulting skills, which may be gained through employment in government, industry, academia, or public practice. 5. If your CPA certificate was issued more than 4 years prior to applying for licensure, you must submit proof listing a minimum of 90 hours of the verifiable category of CPE, including 4 hours covering the subject of professional ethics within 3 years immediately preceding the application for licensure. 6. Failure to comply with a child support order, defaulting on a student loan, or defaulting on taxes. 7. Personal History Information (if applicable) including: <ul style="list-style-type: none"> • Criminal History • Felony Convictions • Dishonorable discharge from military service or public service • Disease or conditions that may interfere with professional work • Denial of a prior professional license

Endorsement

1. Completed online application including all required information
 - Date and Place of Birth
 - Name Change Information
 - Temporary Military Permit
 - Education Information
 - Social Security Number or an SSN Affidavit
2. Applicants must have a current license in another state/country/province at the time of application and provide any non-related professional licenses held in Illinois or another state(s).
3. Applicants must have been originally licensed in another state with requirements that are substantially equivalent to Illinois licensing requirements OR applicant must have at least 4 years of experience in the practice of public accounting after passing the Uniform CPA exam and within the 10 years immediately preceding submission of the application.
4. Applicants must submit certification of licensure status from the jurisdiction in which they were originally licensed and jurisdiction of current or most recent practice.
5. Personal History Information (if applicable) including:
 - Criminal History
 - Felony Convictions
 - Dishonorable discharge from military service or public service
 - Disease or conditions that may interfere with professional work
 - Denial of a prior professional license
6. Failure to comply with a child support order, defaulting on a student loan, or defaulting on taxes.

Application Fees

<i>Fees collected through the licensing process are NOT REFUNDABLE OR TRANSFERABLE.</i>		
Complete	License Type	Submitted:
ALL METHODS	(129) Certified Public Accountant \$120.00	ONLINE PORTAL
<i>NOTES: All major credit and debit cards as well as ACH and eCheck are accepted.</i>		

IMPORTANT NOTICE: Completion of this form is necessary for consideration for licensure under 225 ILCS 450/1 et. seq. (Illinois Compiled Statutes). Disclosure of this information is VOLUNTARY. However, failure to comply may result in this form not being processed.

**VERIFICATION OF
EMPLOYMENT/EXPERIENCE**

SUPPORTING DOCUMENT

VE-PAE

APPLICANT: *Complete the applicant section of this form and forward it to your employer for completion of the verification. You may be requested to further document such experience. This form is to be used for verification of experience during which you provided any type of service or advice involving the use of accounting, attest, management advisory, financial advisory, tax or consulting skills which were gained through employment in government, industry, academia, or public practice.*

1. NAME LAST FIRST MIDDLE	2. DATE OF BIRTH ____ / ____ / ____ Month Day Year	3. SSN OR ITIN ____ - ____ - ____
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4. ADDRESS STREET, CITY, STATE, ZIP CODE	5. PROFESSION NAME AND THREE DIGIT PROFESSION CODE <p style="text-align: center;"> <u>Certified Public Accountant</u> <u>0 6 5</u> Profession Name Profession Code </p>
6. MAIDEN OR GIVEN SURNAME	

7. Have you been granted a Certified Public Accountant Certificate by the University of Illinois or the Board of Examiners?
 Yes No

If "Yes," record certificate number _____ Date of issuance ____ / ____ / ____
 Month Day Year

EMPLOYER: *Complete the remainder of this form. Form must be completed by employer where work experience was obtained.*

PART I. - EMPLOYER INFORMATION

A. NAME AND ADDRESS OF EMPLOYER	B. NAME OF SUPERVISOR
C. SUPERVISOR'S POSITION OR TITLE HELD	

PART II. - APPLICANT EMPLOYMENT INFORMATION

A. NUMBER OF HOURS WORKED PER WEEK	B. TYPE OF EMPLOYMENT <input type="checkbox"/> Full-time <input type="checkbox"/> Part-time	C. DATES OF EMPLOYMENT From ____ / ____ / ____ To ____ / ____ / ____ Month Day Year Month Day Year
D. CATEGORY TYPE (SELECT ONE) <input type="checkbox"/> GOVERNMENT <input type="checkbox"/> INDUSTRY <input type="checkbox"/> ACADEMIA <input type="checkbox"/> PUBLIC PRACTICE		E. APPLICANT'S POSITION OR TITLE HELD

F. GIVE A GENERAL DESCRIPTION OF WORK PERFORMED BY THE APPLICANT RELATIVE TO THE DEFINITION OF "EXPERIENCE" REFERENCED IN SECTION 1420.10 OF THE RULES FOR THE ADMINISTRATION OF THE ILLINOIS PUBLIC ACCOUNTING ACT. (If additional space is required, use the reverse side of this form.)

I do hereby declare that the information recorded hereon is true and correct and, that I am authorized to verify and release the above recorded employee information.

Signature and Title

Date

IMPORTANT NOTICE: Completion of this form is necessary for consideration for licensure under 225 ILCS 450/1 et. seq. (Illinois Compiled Statutes). Disclosure of this information is VOLUNTARY. However, failure to comply may result in this form not being processed.

**PUBLIC ACCOUNTING
CONTINUING PROFESSIONAL EDUCATION
REPORTING FORM**

PA-RF

NAME

LICENSE NUMBER

065 - _____

ADDRESS STREET, CITY, STATE, ZIP CODE

See PA-RF instructions sheets for complete INSTRUCTIONS. You are authorized to photocopy this form if additional space is needed. EACH form must bear an original signature and date.

Verifiable CPE

Total Qualifying Hours

Live Group CPE including Webinars

Instructing / leading a CPE course

Interactive Self Study CPE

Non Interactive Self Study

University or College Course

Publishing an Article or Book or
Developing /Reviewing a CPE Course

Total Verifiable CPE Hours

Non-Verifiable CPE

CPE, other than from a recognized educational or professional sponsor

Work on technical committees of an international, national or state
professional association or member organization

Professional Reading of published materials that does not
provide a certificate of completion or an assessment process

Consultation with outside experts or research in a subject area new to
the licensee or when regulations or standards have changed

Total Non-Verifiable CPE Hours

Total of all CPE Hours Claimed

Under penalties of perjury, I declare I have examined this form and all supporting documents submitted by me in connection therewith, and to the best of my knowledge, they are true, correct, and complete.

Signature

Date