



P A S C
Public Accountants Society of Colorado
www.coloradoaccountant.org

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APPLICATION FOR MEMBERSHIP

PERSONAL INFORMATION

Mr. Miss
 Mrs. Ms.

First Name MI Last Name

PTIN Years Experience Year of Birth

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Work Phone Fax Home Phone

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E-mail Other Phone

Firm Name Principals

Designations

- CPA
 EA
 ABA
 ATA
 ATP
 CFP
 Other: _____

Memberships in State or National Organizations

- NSA
 NAEA
 ICFP
 AICPA
 COCPA
 COSEA
 NAPFA
 Other: _____

Convicted of Felony in past 10 years? Yes No

- Sole Prop
 Partnership
 Corporation
 LLC/LLP

Mailing Address City State Zip

TYPE OF MEMBERSHIP

- ACTIVE MEMBER**—Dues: **\$170** (Active Members are required to earn 72 hours of CPE every three years)
 I have at least three years public accounting and/or taxation experience; maintain an office for the rendition of accounting and/or tax services as a proprietor, partner, corporate officer, or employee thereof; and am an accountant or tax/practitioner by occupation.
 I am accredited in accounting and/or taxation by the Accreditation Council for Accountancy.
 I am a Certified Public Accountant.
 I possess a valid Treasury card. (I am an Enrolled Agent.)
- ASSOCIATE MEMBER**—Dues: **\$120**
 I am an employee of an accounting or tax practice firm.
 I am an accountant or bookkeeper in governmental service, a bank or other financial institution, or private business or organization.
 I meet the active member requirements except for three years of experience.
- EDUCATOR MEMBER**—Dues: **\$40**
 I am a full-time teacher or administrator in the educational system. School: _____
- STUDENT MEMBER**—Dues: **\$20**
 I am pursuing studies in accounting, business administration, finance, or related subjects in a college, university or business School; Name of School: _____
- NON-RESIDENT MEMBER**—Dues: **\$85**
 Principal residence and/or practice outside of Colorado.

A copy of your professional stationery or business card must accompany this application for Active, Associate and Educator Memberships.

The accompanying statements are correct to the best of my knowledge and belief. I have read and will practice in strict conformity with the Code of Ethics included with this application.

Signature: _____ Date _____ Sponsor: _____ (Optional)

Dues Payment: Payment of the first year's dues is required at time of application. Dues the following year will be prorated and billed to you.

Name on Card

Check Visa MasterCard Discover

Payment Type Card Number Expiration Card Code

Benefits of Membership

Tax and Accounting Seminars

The Society cosponsors one and two day seminars with the National Center for Professional Education as well as monthly and quarterly mini- and half-day seminars.

Legislative Representation

The Society maintains professional representation and close contact with the Colorado legislature and the State Board of Accountancy, keeping constant vigil on matters affecting you and the profession.

Bi-Monthly Newsletter

The Society publishes a bi-monthly newsletter informing you of current events both within and without the Society, as well as noteworthy items from the IRS and Colorado Department of Revenue.

Networking with Peers

The Society offers you the opportunity to know and confer with other professionals with your interests, thus assisting you in your practice. There is usually a luncheon accompanying the seminar program.

Chapter Meeting

The Society has chapters in metro Denver, Colorado Springs, Sterling and the Western Slope, offering luncheon and special seminar meetings, keeping you informed on matters affecting the financial professional.

Annual Convention and Accounting Forum

The annual convention and accounting forum, often held in a central resort area, provides one of the few sources of accounting CPE as well as informative business meetings and social gatherings.

Web Site

Our Web Site (<http://www.coloradoaccountant.org>), provides members with up-to-the-minute information about society business, plus State and Federal tax information. Of particular benefit is the membership directory that allows members and the public to locate a professional accountant. Another feature of the site is a chat-room that allows members to post accounting and tax questions, which are answered by other professionals who have experience in the area of concern.

Code of Ethics

A member of this Society shall not violate the confidential relationship between himself and his clients or former clients.

A member of this Society shall not offer or render a professional service for a contingent fee during any period where the professional service consists of an audit, review or compilation engagement, including the period of time covered by any historical financial statements involved while performing an audit, review or compilation engagement; further, a member shall not offer to accept or accept a contingent fee for the preparation of original or amended tax returns or claims for tax refunds.

A member of this Society or a firm of which he/she is a partner or shareholder shall not express an opinion on financial statements of an enterprise unless he/she and his/her firm are independent of such enterprise. Accordingly, a member shall not express an opinion on financial statements of an enterprise financed in whole, or in part, by public distribution of securities or on financial statements for use as a basis of credit or if he/she or a member of his/her immediate family owns or is committed to acquire a substantial financial interest in the enterprise, or during the period covered by the examination he/she has been a director, officer or employee of the enterprise unless such interest or relationship is disclosed in the report.

A member of this Society shall not allow any person to practice in his/her corporate, partnership or individual name who is not a partner, professional corporation co-shareholder or in his/her employ.

A member of this Society who is engaged in the practice of public accounting shall not concurrently engage in any business or occupation which would create a conflict of interest in rendering professional services.

A member of this Society shall be diligent, thorough and completely candid in expressing an opinion on representations he/she has examined.

A member of this Society shall not sign a report purporting to express his/her opinion as the result of an examination of financial statements, unless they have been examined by him/her, or by a member or employee of his/her firm.

A member of this Society shall not permit his/her name to be used in conjunction with any special purpose statement prepared for his/her clients that anticipates results of future operations, unless he/she discloses the source of information used and what assumptions he/she has made, and unless he/she indicates he/she does not vouch for the accuracy of the forecast.

A member of this Society shall not accept a commission from any person or client for whom the member offers or renders concurrently a professional service, where the professional service consists of an audit or review engagement (including the period of time covered by any historical financial statements involved while performing an audit or review engagement), nor accept a commission where the member performs a compilation of a financial statement when the member expects or reasonably might expect that a third party will use the financial statement and the member's compilation report or transmittal does not disclose a lack of independence.

A member of this Society shall not seek to obtain clients by advertising or other forms of solicitation in a manner that is false, misleading or deceptive.

A member of this Society in practice as an individual shall not use a firm name or plural term as "and company" or "and associates" or other designation indicating anything other than individual ownership.

A member of this Society who receives an engagement for services by referral from another accountant shall not discuss or accept an extension of his/her services beyond the specific engagement without first consulting with the referring accountant.